User Guide

September 2014

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Overview of Textboom

Textboom by **MobiConcepts** is a proprietary global consumer engagement technology platform that allows companies of all sizes to manage every aspect of customer communication and interaction. The platform offers the most robust set of features to facilitate engagement via cell phone or the web. Whether you want to launch a broadcast campaign to your subscribers as well as to social networking sites or engage your clients with text2vote, text2win or text2quiz, collect data or develop a dynamically scripted conversation with your target audience, **Textboom** allows you to launch such campaigns with ease while using our intuitive user interface. No technological expertise is necessary.

Textboom offers a one of a kind white-label feature set with 4 levels of account hierarchy, custom billing and rights & permissions.

MobiConcepts is an ever-growing software provider that has allowed hundreds of major brand and companies to take their consumer engagement to the next level. With new updates and features rolling out every quarter, we are always ready to grow with you.

Environment

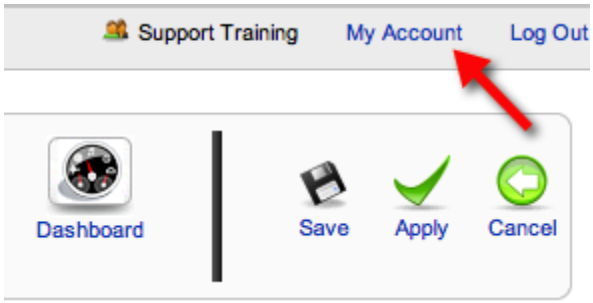
The Textboom environment has an extensive number of features and options to help you manage your entities and campaigns.

In this chapter, we explain how to create these campaigns:

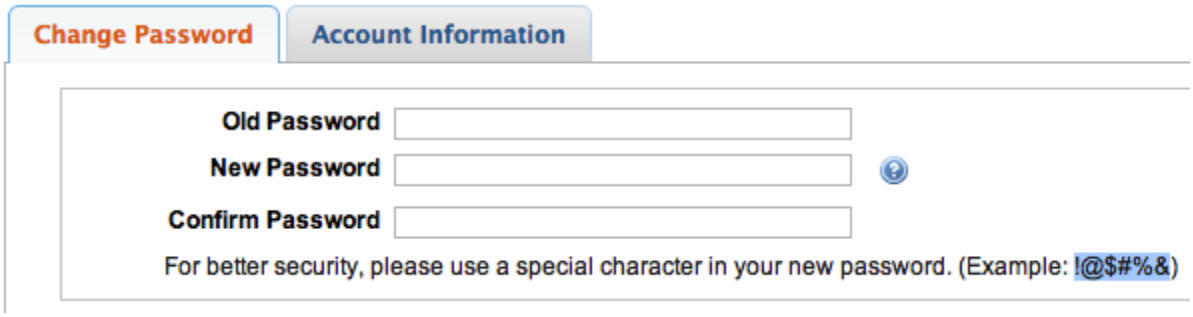
- My Account
- Account Types
- Glossary
- Dashboard Overview
- Toolbar and Icons

My Account

You can manage your Textboom account settings by clicking the **My Account** link in the upper right corner of any page.



This page contains two tabs, **Change Password** and **Account Information**.


Change Password
Account Information
Old Password
New Password
Confirm Password
For better security, please use a special character in your new password. (Example: !@$#%&)

Changing Your Password

To change your password, do the following:

1. Click on the **Change Password** tab.
2. Enter your current password into the **Old Password** field.
3. Enter your new password into **New Password** field.
4. Re-enter your new password into the **Confirm Password** field.
5. Click the **Save** button in the upper right corner of the page.

NOTE: We recommend that you use a special character in your password, such as !, @, $, #, %, or & .

General Account Information

To modify your other account information, do the following:

1. Click on the **Account Information** tab.
2. If you want to change your default language, click the **Language** drop-down and make your selection.
3. If you like, enter your **First Name** and **Last Name**.
4. Optionally, enter your **E-mail** address and/or **Cell Phone** number.
5. Choose your **Time Zone** from the drop-down.
6. Click the **Save** button in the upper right corner of the page.

Account Types

Operating Company

An Operating Company (OC) is an account type that provides access for managing multiple *Agency* and *Client* accounts. At the Operating Company account level, you can create, edit, disable and delete all aspects of agency and client accounts.

Agency

An Agency is an account type that provides access to manage multiple *Clients*. Agency users can create, edit and delete client accounts. The rights and permissions of Agency users is given by the parent Operating Company.

Client

A Client is defined is the account type with the lowest level of account access. Client users may only manage only one account at a time. The parent Agency user assigns the rights and permissions of clients.

Glossary

Here we define key terms that are found throughout the user guide.

Database - Storage for all records and their respective fields of data.

Keywords – Words or combinations of words (without spaces) sent from cell phones to short codes that initiate a campaign, remove the record from the list or request help.

Mobile Terminated (MT) – Messages sent from the platform to cell phones.

Mobile Originated (MO) – Messages sent from cell phones to the platform.

Network Look Up (NL) – A service provided to obtain the carrier supplying service to that particular phone number.

QR Code - QR is an abbreviation for *quick response*. These 2 dimensional squares store encoded data that can be launched when scanned with a smart phone application.

Record - a collection of data elements stored in the database.

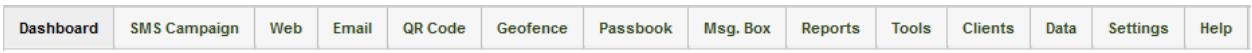
Short Code – 5 or 6 digit numbers to send and receive SMS messages. Short Codes are used because carriers allow a higher volume of messaging.

Web Widget - a web widget is a feature that allows users to opt-in to a list on a website. Once you configure the settings, custom code is generated for an embedded or pop-out widget.

Dashboard

The Dashboard is a summary page, in which you can view statistical information at the one of several levels: Operating Company, Agency , or Client. At a glance, you may view the amount of MTs (messages terminated), MOs (messages originated), or NLs (network lookups) for each entity. You can easily navigate to find more detail.

You can always get back to the **Dashboard** by using the button in the tool bar at the top of the page.



Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see the listing. If OC names are visible, you can click on an OC name to view its agencies:

If agency names are visible, you can click on an agency to see a listing of its clients:

If client names are visible, you can click on a client to view more statistical details:

In the listing, you can click on these small icons to perform tasks specific to an entity:

- Click this icon to view details for the entity. It is the same as clicking on the entity name (OC, agency, or client).
- Click this icon to edit the edit the entity (you will exit the Dashboard).
- Click this icon to disable the entity. A disabled entity cannot be used again until it is enabled.
- Click this icon to delete an entity. A deleted entity is both disabled and invisible.

Returning to the Operating Company or Agency

As you go from Operating Company down to Agency and down to Client, you will see a small breadcrumb sequence appear just below the toolbar. You may click on these links to return to the agency or the operating company:

Enterprise Account > Operating Company > Agency Account > Client Account

Summary

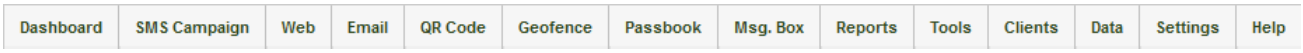
At the bottom of the page, you can view utilization statistics:

Utilization:	**Month MT**: 105	**Month MO**: 86
	Pre-Paid MTs (STD): 0/0	**Pre-Paid MOs (STD)**: 0/0

See the topic toolbar and icons to learn more about navigation to other parts of the Textboom application.

Toolbar and Icons

At the top of any page, you will find a toolbar consisting of a single horizontal menu:

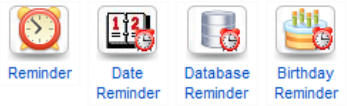


You can click on any of these items, or you can access submenus beneath. With the mouse arrow, hover over any of the items in the toolbar to display the sub-menus. Most submenus contain several items. For example, here is the submenu that appears when you hover over the SMS Campaign item:

You may click on any of the items to access the corresponding feature. Feel free to explore the toolbar and its sub-menus.

You will also find a number of icons directly beneath the toolbar. These icons are carefully chosen to help you navigate to features that relate closely with the work you are doing with the present feature. For example, these icons appear on the Dashboard page:

As in the tool bar, if you hover the mouse arrow over an icon, sub-menus will display. For example, these sub-menu icons appear if you hover over the icon **Reminder**:



To the right of these icons, you will also find icons to handle administrative tasks, such enabling, disabling, and deleting:

STOP / HELP Updates Disable Messages & Add Spanish Messages

Disabling Opt--Out Messages

We have added the ability to disable the opt-out message sent to records after the system receives a STOP message This feature can be located at the Database Set Up Screen (edit an existing database or create a new one to access this functionality), the New / Edit Account screen on the Client, Agency, Operating Company and Enterprise levels and from the My Account link.

If a user is subscribed to multiple campaigns on the same short code and sends STOP, the user will be opted-out of all the campaigns on that short code.

How the system determines to send an Opt-Out

There are two cases to consider:

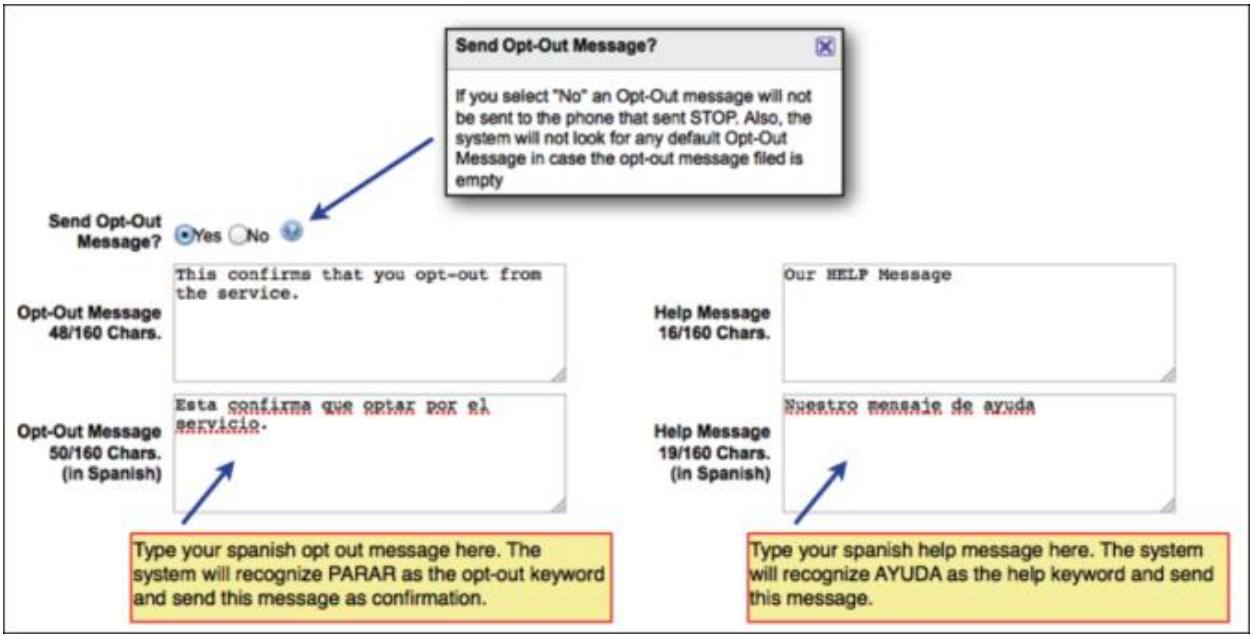
1. If a record is joined to a single database, the system will first query the database for an opt-out message.

- If no opt out message is to be sent, the record will NOT receive the message.
- If an opt-out message is to be sent, the system will look to the database opt-out message.
- If an opt-out message is to be sent but the database opt-out message is empty, then the system will search all parent accounts for opt-out messages starting with the direct parent account.

2. If a record is opted-into multiple databases, then the system will decide to send or not send the opt-out message as indicated at the level above the account where the databases reside.

Spanish STOP & HELP

This is a new feature: a Spanish opt-out and help message can be sent when AYUDA (Help) and PARAR (Stop) is sent by a record.


Send Opt-Out Message?
If you select "No" an Opt-Out message will not be sent to the phone that sent STOP. Also, the system will not look for any default Opt-Out Message in case the opt-out message filed is empty
Send Opt-Out Message?
Yes
No
Opt-Out Message 48/160 Chars.
This confirms that you opt-out from the service.
Help Message 16/160 Chars.
Our HELP Message
Opt-Out Message 50/160 Chars. (in Spanish)
Esta confirma que optar por el servicio.
Help Message 19/160 Chars. (in Spanish)
Nuestro mensaje de ayuda
Type your spanish opt out message here. The system will recognize PARAR as the opt-out keyword and send this message as confirmation.
Type your spanish help message here. The system will recognize AYUDA as the help keyword and send this message.

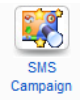
SMS

All SMS functionality and features are accessed during an SMS Campaign (except Keywords). Throughout the Textboom application, “campaign” describes the process of compiling a text message engagement. If you want to create an Auto-Responder, Broadcast or a Txt 2 Vote, please remember that Textboom identifies these as individual campaigns.

Note: If a keyword is necessary, you should create it *before* you prepare a campaign.

In this chapter, we explain how to create these campaigns:

- SMS Campaign Manager
- TCPA Opt-In
- Auto-Responder
- Broadcast
- Data Collection Campaign
- Txt 2 Vote
- Txt 2 Win – Every X Wins
- Txt 2 Win - Random
- Txt 2 Quiz – Every X Wins
- Txt 2 Quiz - Random

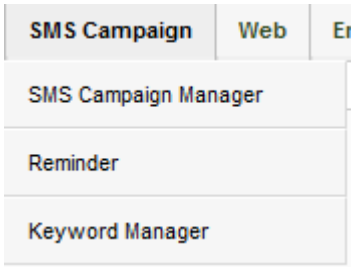
You may access these tools from the **SMS Campaign** menu in the **Textboom** toolbar or the quick link 

icon on the Dashboard.

SMS Campaign Manager

The **SMS Campaign Manager** helps you manage all the aspects of your SMS campaigns. From the manager, you can execute all SMS campaign actions with ease. Once you create a campaign, it will be appear with all other active and inactive campaigns.

To begin, you can access this feature by selecting **SMS Campaign > SMS Campaign Manager** from the toolbar.



Or by using the quick link icons that are located under the toolbar on the Dashboard.

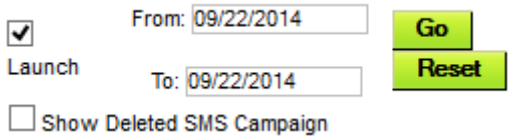
The following sections explain all the functions of the campaign manager that you can use to create your campaigns.

Filters

On the left side of the report control panel, you'll find a group of filters (below). Choose from one or more of these drop-down menus to filter by ***OC (Operating Company)***, ***Agency***, or ***Client***, **Status**, or ***Campaign Type***.

Along with these filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.

On the right side of the control panel, you can also filter by **SMS Campaign Type**. You might, for example, choose to view only the ***AutoResponder*** campaigns. Uncheck the box for **Launch** if you also want to see campaigns that have expired. Check the **Show Deleted SMS Campaign** checkbox if you want to display campaigns that had been previously deleted.



Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Restrict by Date Range

On the right side of the report control panel, you may find the **From** and **To** of date filters (see the figure above). Follow these steps to limit the records in the listing to only those that fall within a date range:

1. Click the **From** calendar icon (for example, enter 9/22/2014).
2. Next, click the **To** calendar icon (you might enter 9/22/2014).
3. Click the **Go** button to update the listing. Only the records that fall within the date range will appear in the results.
4. Click the **Reset** button to revert back to the original filter settings.

Enable, Disable, or Delete Campaigns

In the upper right corner of the page, you may find three icons:

Check the box next to any record, and then click the icon that corresponds to the function you want to apply:

- **Enable** - enables a record that has been previously been disabled.
- **Disable** - Click this icon to disable the campaign. A disabled campaign cannot be used again until it is enabled.

- **Delete** - click this icon to delete a campaign. A deleted campaign is both disabled and invisible except when the **Show Deleted SMS Campaign** box has a check in it.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see a list of all your campaigns.

Managing Campaigns

At the extreme right end of each record in the listing you'll find a series of small icons:

Click this icon to view Campaign Performance Report

Click this icon to view a popup showing the campaign message dialogue.

Click this icon to edit the campaign (you will exit the Campaign Manager).

Click this icon to cause the campaign to expire immediately. A campaign that you expire will no longer send messages.

Click this icon to disable the campaign. A disabled campaign cannot be used again until it is enabled.

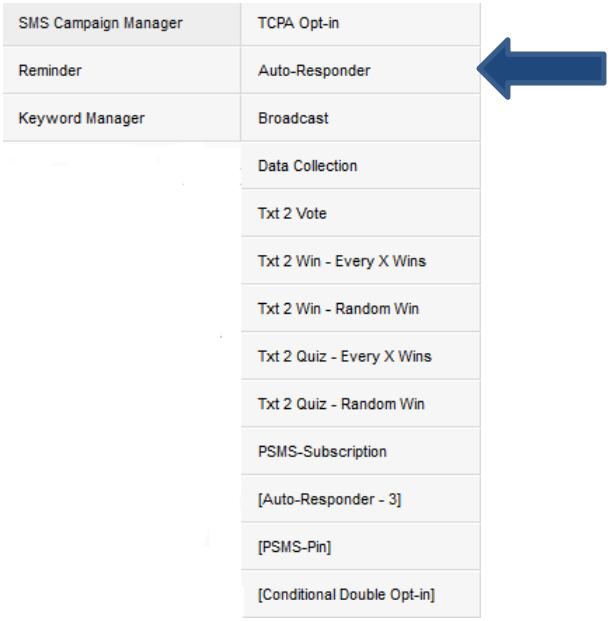
Click this icon to delete a campaign. A deleted campaign is both disabled and invisible except when the **Show Deleted SMS Campaign** box has a check in it.

Click this icon to enable campaigns that have been dis-abled.

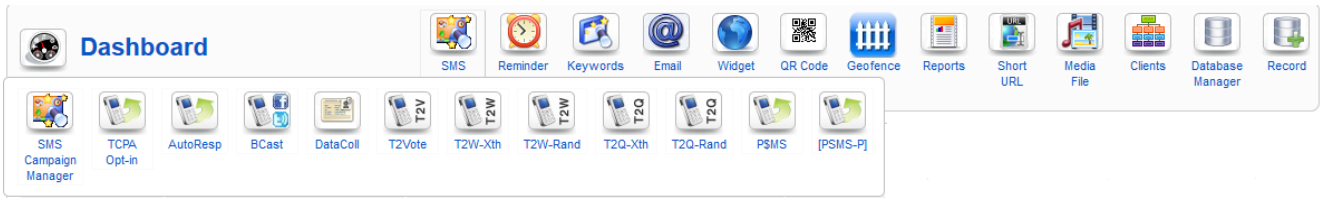
Auto-Responder

The **Auto-Responder** feature is a tool for creating campaigns that solicit responses through SMS text messages. We provide you with many options, and yet it's quite easy to setup.

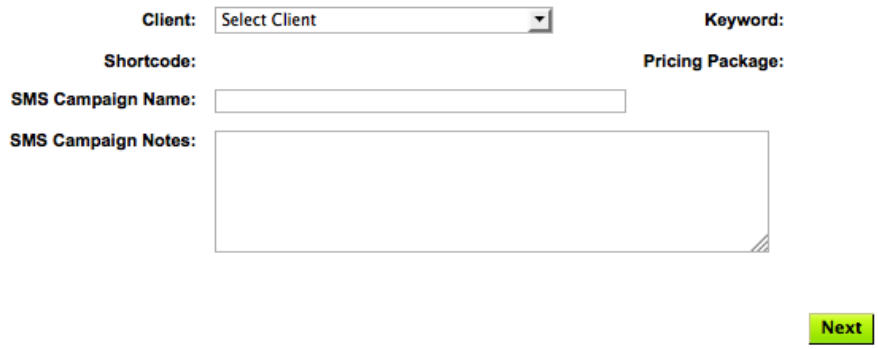
You may access this feature by choosing **SMS Campaign > SMS Campaign Manager > Auto-Responder** from the toolbar.



Don’t forget that you can access the SMS Campaigns by utilizing the quick link icons that are located under the toolbar on the Dashboard.



After choosing this menu item, you will see a page much like the figure below.



Auto-Responder Profile Summary

To begin, follow these steps:

1. Click the **Client** drop-down list, and then select the correct client name.
2. Also, choose a **Keyword** from the drop-down list (if any are available).
3. Enter a **SMS Campaign Name**.
4. Optionally, enter the **SMS Campaign Notes**.
5. When you're happy with the entries, click the **Next** button to continue on to the next step, **Message**.

Overview of Campaign

Auto Responder is designed to make your campaigns more exciting while remaining compliant with all the regulations. This gives users the ability to check each record for a previous double opt-in. This will allow the system to provide the appropriate message flow so records don't have to double opt-in each time they text a keyword.

Note: You can create an Auto Responder campaign as either as a Double Opt-in or Single Opt-in campaign.
A subscriber that completes a Double Opt-in will automatically be flagged as "TCPA Compliant". For Single Opt-in you can instruct the system to flag the subscriber as "TCPA Compliant" as long as such action is complaint with the TCPA guidelines.

Message

In this step, you'll write the Auto-Responder message and perhaps configure some options. Think of it as a conversation template: here you are configuring the interaction between the SMS recipient and your campaign. Remember, the maximum length of the message is 160 characters.

Have a look at the figures and read below to learn the steps

Double Opt-In Auto Responder:

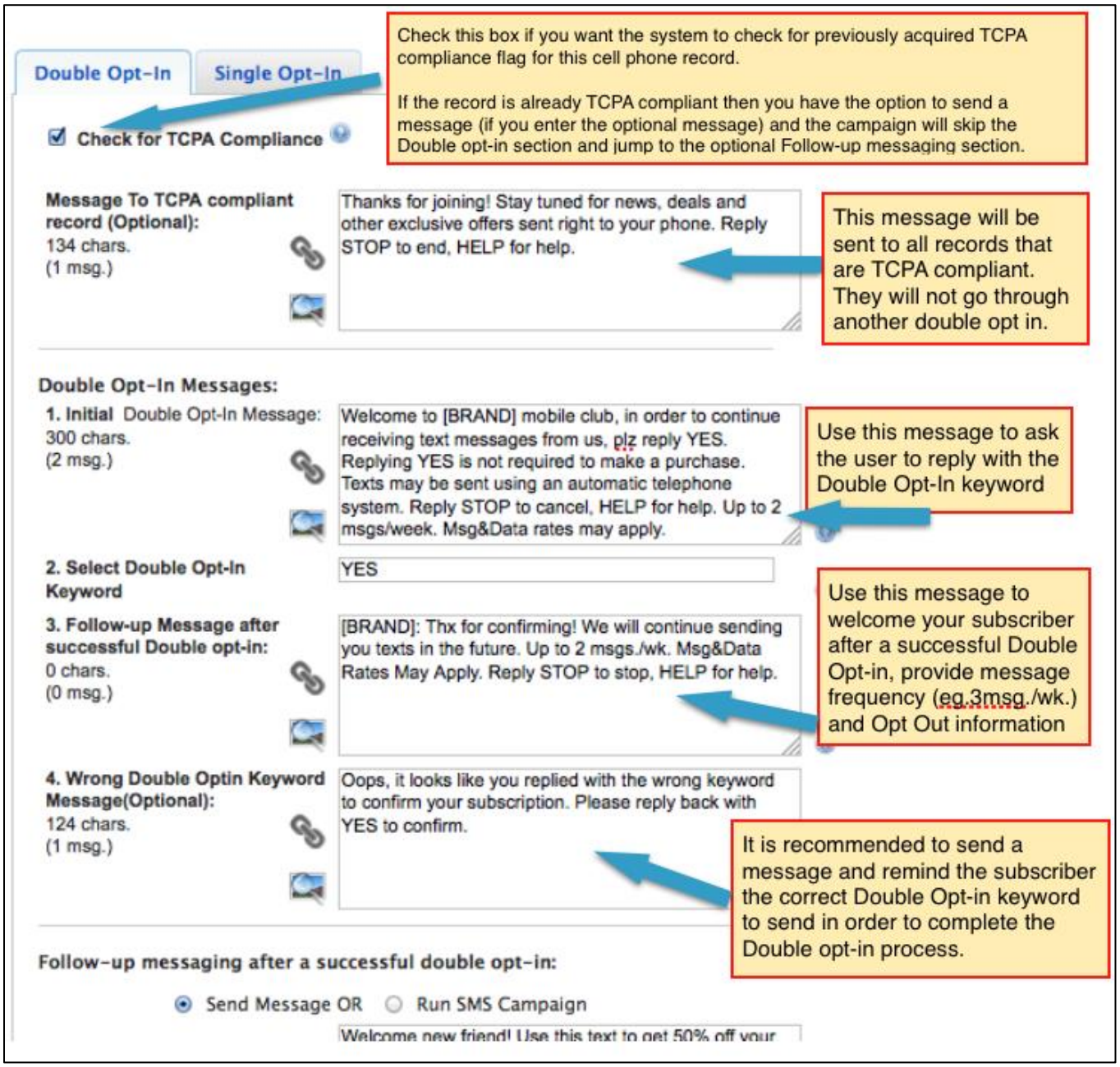
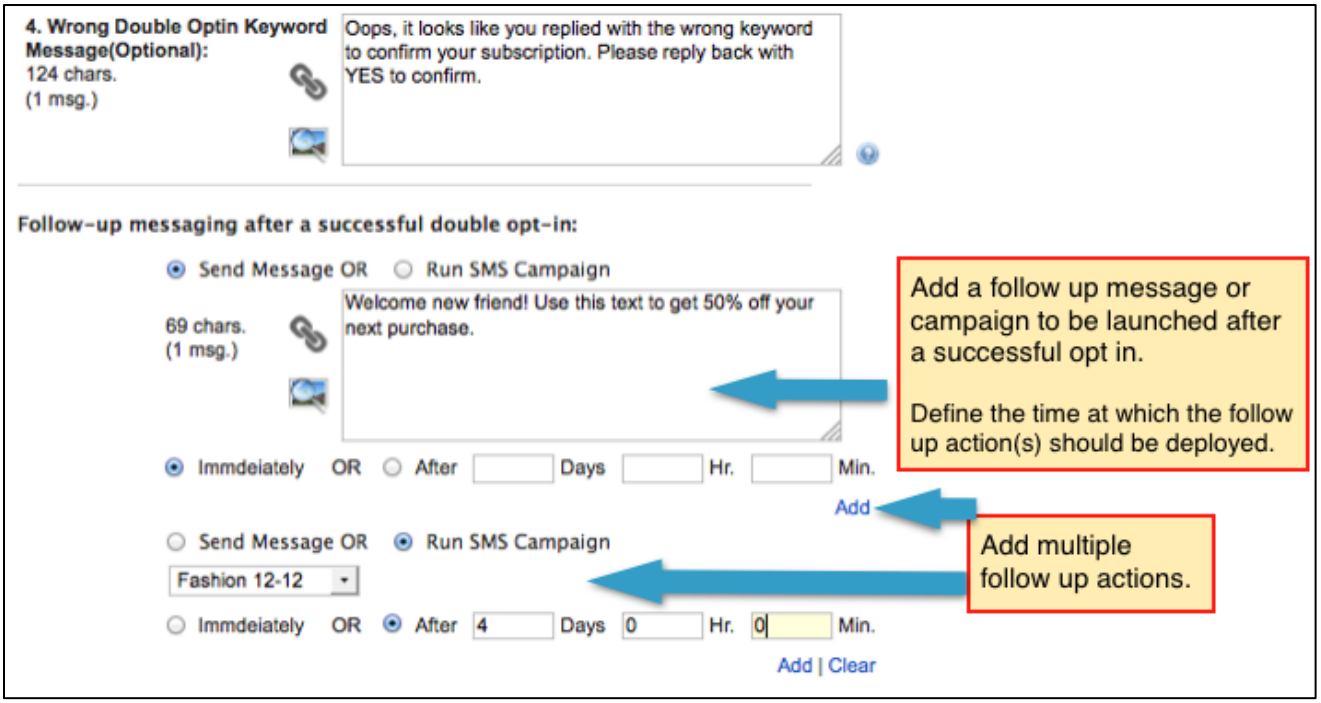
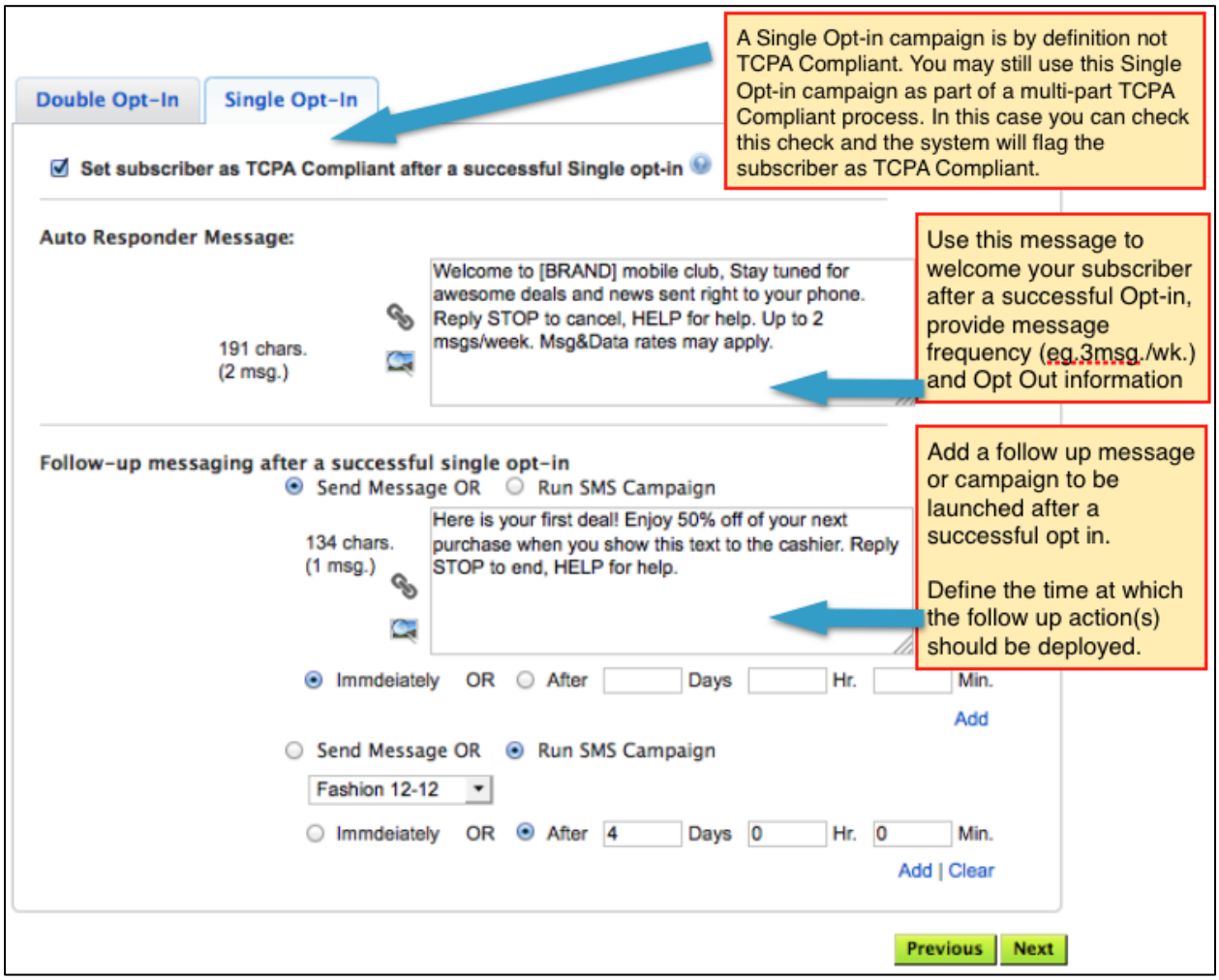

Double Opt-In
Single Opt-In
Check for TCPA Compliance
Check this box if you want the system to check for previously acquired TCPA compliance flag for this cell phone record.
If the record is already TCPA compliant then you have the option to send a message (if you enter the optional message) and the campaign will skip the Double opt-in section and jump to the optional Follow-up messaging section.
Message To TCPA compliant record (Optional):
134 chars.
(1 msg.)
Thanks for joining! Stay tuned for news, deals and other exclusive offers sent right to your phone. Reply STOP to end, HELP for help.
This message will be sent to all records that are TCPA compliant. They will not go through another double opt in.
Double Opt-In Messages:
1. Initial Double Opt-In Message:
300 chars.
(2 msg.)
Welcome to [BRAND] mobile club, in order to continue receiving text messages from us, plz reply YES. Replying YES is not required to make a purchase. Texts may be sent using an automatic telephone system. Reply STOP to cancel, HELP for help. Up to 2 msgs/week. Msg&Data rates may apply.
Use this message to ask the user to reply with the Double Opt-In keyword
2. Select Double Opt-In Keyword
YES
3. Follow-up Message after successful Double opt-in:
0 chars.
(0 msg.)
[BRAND]: Thx for confirming! We will continue sending you texts in the future. Up to 2 msgs./wk. Msg&Data Rates May Apply. Reply STOP to stop, HELP for help.
Use this message to welcome your subscriber after a successful Double Opt-in, provide message frequency (eg.3msg./wk.) and Opt Out information
4. Wrong Double Optin Keyword Message(Optional):
124 chars.
(1 msg.)
Oops, it looks like you replied with the wrong keyword to confirm your subscription. Please reply back with YES to confirm.
It is recommended to send a message and remind the subscriber the correct Double Opt-in keyword to send in order to complete the Double opt-in process.
Follow-up messaging after a successful double opt-in:
Send Message OR
Run SMS Campaign
Welcome new friend! Use this text to get 50% off your

Image continued on next page

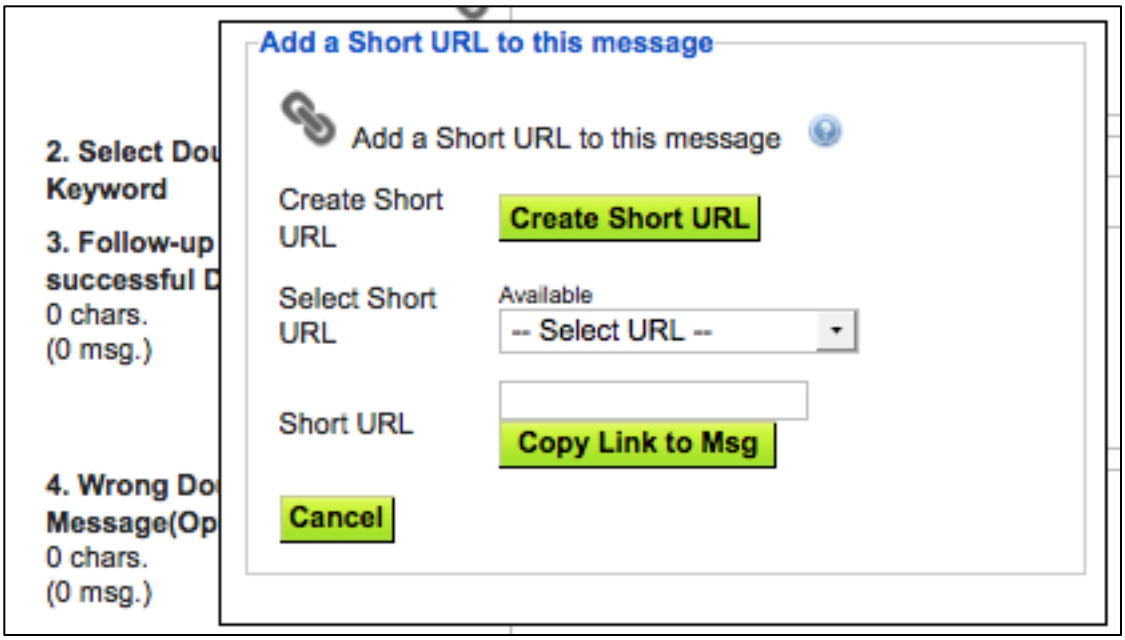

4. Wrong Double Optin Keyword Message(Optional):
124 chars.
(1 msg.)
Oops, it looks like you replied with the wrong keyword to confirm your subscription. Please reply back with YES to confirm.
Follow-up messaging after a successful double opt-in:
Send Message OR Run SMS Campaign
69 chars.
(1 msg.)
Welcome new friend! Use this text to get 50% off your next purchase.
Immdeiately OR After Days Hr. Min.
Add
Send Message OR Run SMS Campaign
Fashion 12-12
Immdeiately OR After 4 Days 0 Hr. 0 Min.
Add | Clear
Add a follow up message or campaign to be launched after a successful opt in.
Define the time at which the follow up action(s) should be deployed.
Add multiple follow up actions.

Single Opt-In


A Single Opt-in campaign is by definition not TCPA Compliant. You may still use this Single Opt-in campaign as part of a multi-part TCPA Compliant process. In this case you can check this check and the system will flag the subscriber as TCPA Compliant.
Double Opt-In
Single Opt-In
Set subscriber as TCPA Compliant after a successful Single opt-in
Auto Responder Message:
Welcome to [BRAND] mobile club, Stay tuned for awesome deals and news sent right to your phone. Reply STOP to cancel, HELP for help. Up to 2 msgs/week. Msg&Data rates may apply.
191 chars.
(2 msg.)
Use this message to welcome your subscriber after a successful Opt-in, provide message frequency (eg.3msg./wk.) and Opt Out information
Follow-up messaging after a successful single opt-in
Send Message OR
Run SMS Campaign
Here is your first deal! Enjoy 50% off of your next purchase when you show this text to the cashier. Reply STOP to end, HELP for help.
134 chars.
(1 msg.)
Add a follow up message or campaign to be launched after a successful opt in.
Define the time at which the follow up action(s) should be deployed.
Immdeiately
OR
After
Days
Hr.
Min.
Add
Send Message OR
Run SMS Campaign
Fashion 12-12
Immdeiately
OR
After
4
Days
0
Hr.
0
Min.
Add | Clear
Previous
Next

Adding a URL to the message

1. To add a short system-generated hyperlink, check the box for **Add Short URL to this message**.
2. Click the **Create Short URL** button, and then enter a **Title** and the **URL**. The **Title** will be the display text for the link.
3. In the **Select Short URL** drop-down list, choose the link you just made to display the URL in the **Short URL** field.
4. Now, click the **Copy Link to Msg** button to insert the link into the reply message text.

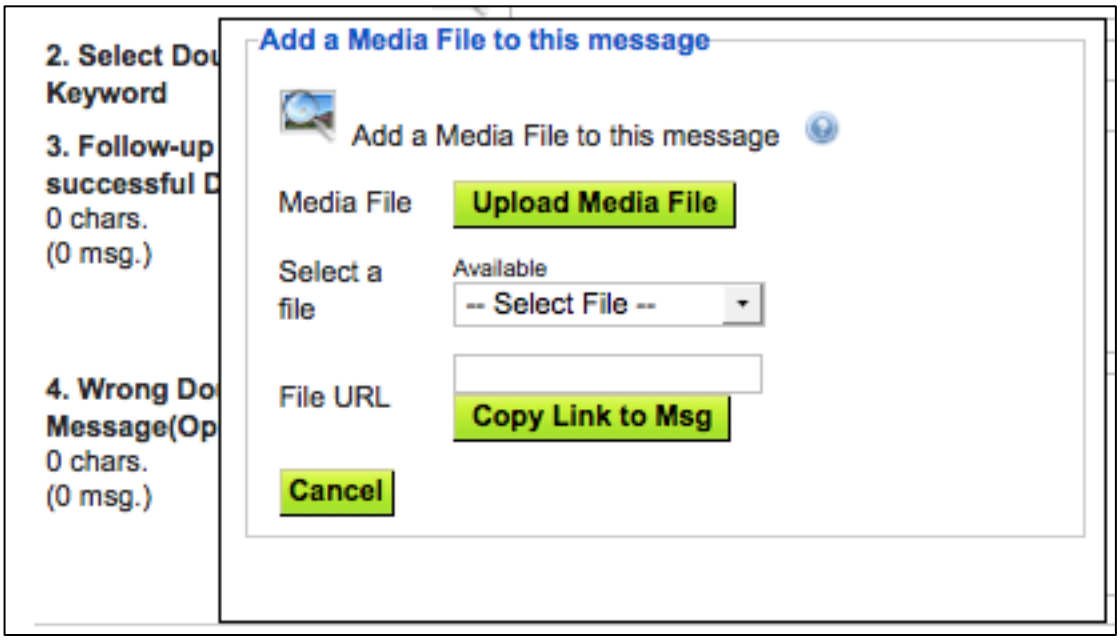


Adding a Media File to the message

1. To add a media file (such as a video, image, or music), check the box for **Add a Media File to this message**.
2. Click the **Upload Media File** button, then enter a **Title** and then click the Browse button to upload the media file (**MM file**). The **Title** will be the display text for the media file link
3. In the **Select a file** drop-down list, choose the link you just made to display the URL in the **File URL** field.
4. Now, click the **Copy Link to Msg** button to insert the media file link into the reply message text.
5. Click **Next** to move on to the **Destination Database** step.

Textboom supports these types of media files:

- .asf — ASF digital audio/video file format
- .avi — AVI movie file format
- .flv — FLV Flash video file format
- .m4v — raw MPEG4 video format
- .mov, mp4, m4a, 3gp, 3g2, mj2 — QuickTime/MPEG4/Motion JPEG 2000 file format
- .wmv — Windows Media Video file format
- .mp3 — mp3 audio files format

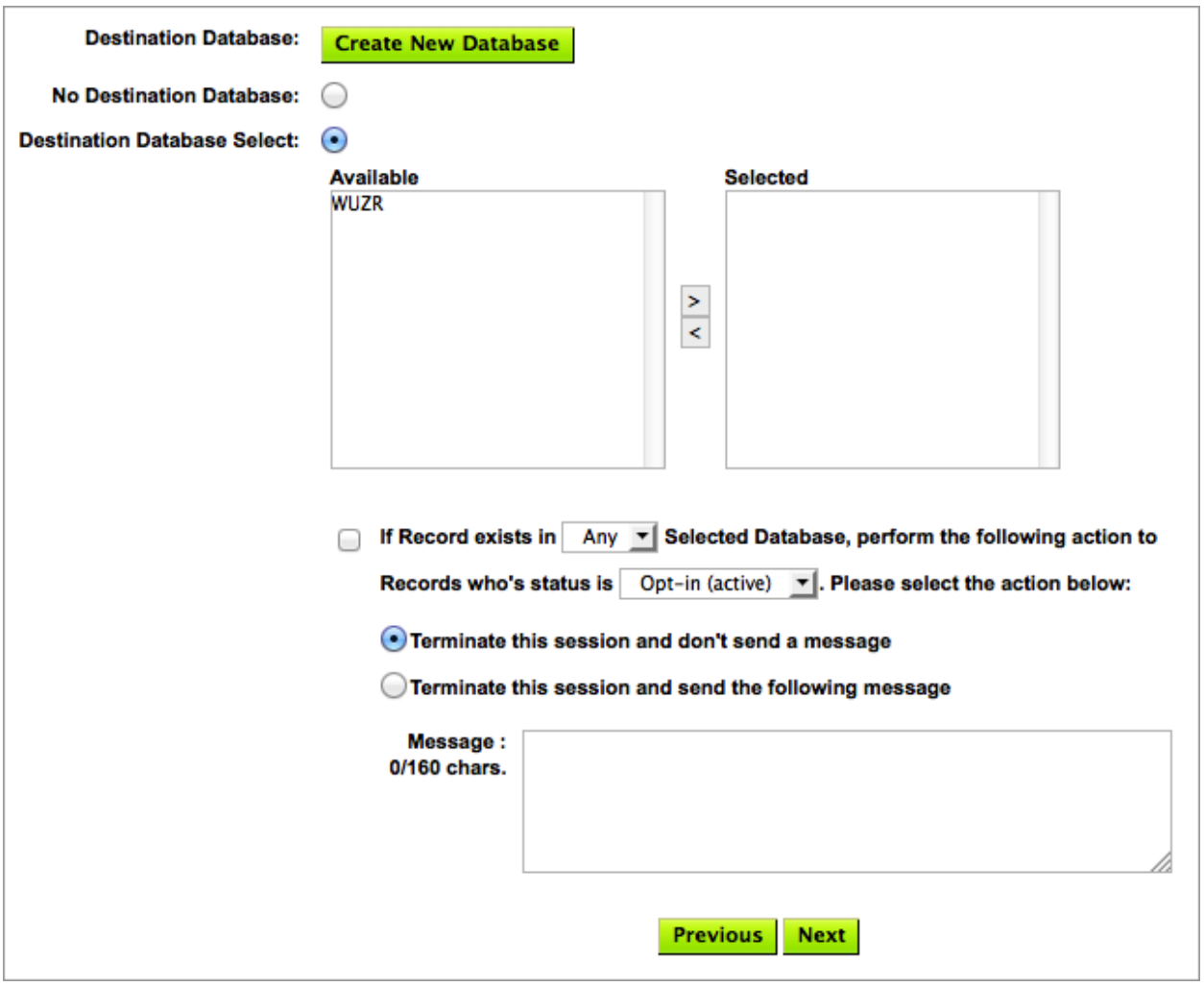


Destination Database

In this step, you'll choose the database in which you want to store your campaign data. If no database exists, you may create one by following these steps:

1. Click **Create New Database**.
2. Enter a **Database Name**.
3. Check the box for **Send Subscription Renewal Msg?** if you want to send a monthly subscription reminder message to all of the contacts in your database .
4. Click **Submit** to commit your changes; click **Cancel** to discard.

If at least one database already exists, you'll see it in the **Available** listing (see the figure below). Follow the steps below to manage your databases.



To choose one or more existing databases:

1. Click the database name in the **Available** listing, then click the right arrow to move the database name to the **Selected** listing. You can also double-click on the database name that you want to Select.
2. If you want to take action when a duplicate entry is found in a database, check the **If Record exists** box.
3. In the first drop-down, choose ***All*** if you want to this setting to apply only if a record is found in all databases in the **Selected** listing. Leave the default (***Any***) if you want this setting to apply to a record found in any of the selected databases.
4. In the second drop down, the default option is ***Opt-in (Active)***. If you leave this option, the setting will only apply to duplicate records having an opt-in value. Instead, you might choose **Opted-out (Inactive)** or ***Any***.

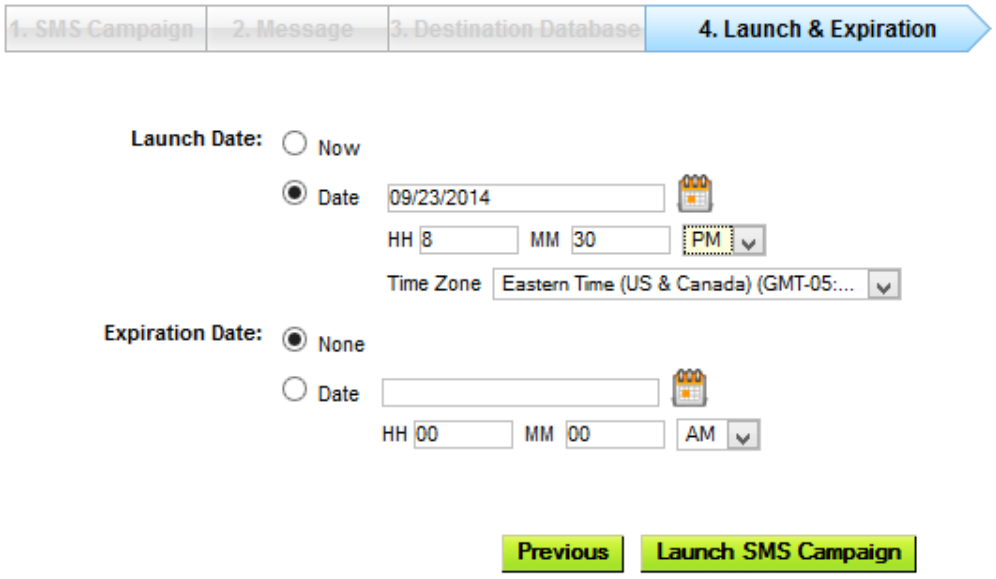
5. Next, decide what happens when a duplicate is found. You can choose to **Terminate this session and don't send a message**, or choose to send a message. If you choose the second option, then enter the **Message**.
6. When you're happy with your changes, click **Next** to continue to the last step.

Launch & Expiration

This is the last step, in which you'll define the duration of the campaign by specifying the launch and expiration dates. The default settings are such that the campaign will begin immediately and have no expiration date. Follow these simple steps if you want to modify either, or both:

Configure a Launch Date

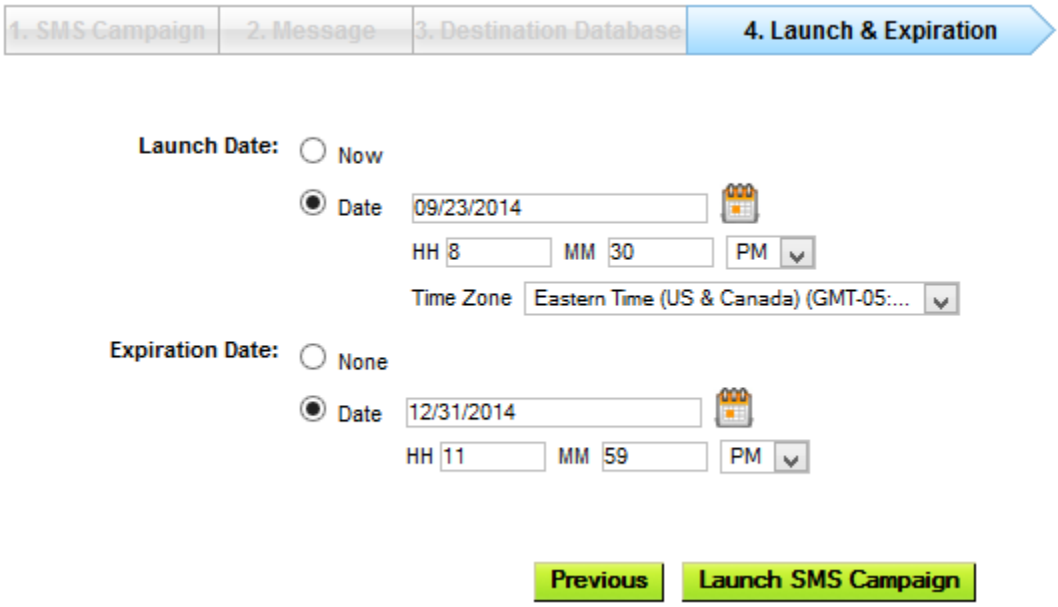
1. If you want to specify a launch date, click the **Date** radio button. If you want the campaign to begin immediately, click on **Now**.
2. Click the calendar icon to select a date on which the campaign will begin.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.



Configure an Expiration Date

1. If you want to specify an expiration date, click the **Date** radio button. If you don’t want the campaign to expire click **None**.
2. Click the calendar icon to select a date on which the campaign will expire.

3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

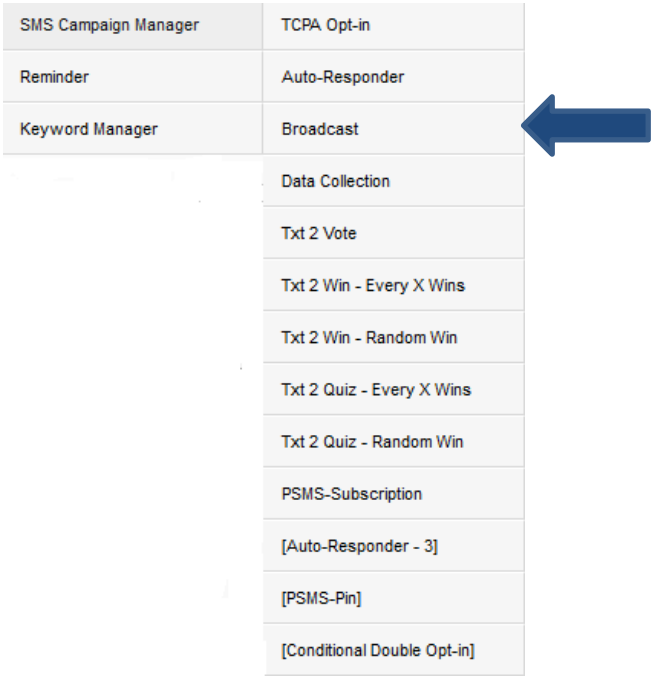


You may click the **Previous** button to return to prior steps. If you're happy with all of the settings, click **Launch SMS Campaign** to commit your changes and return to the main page.

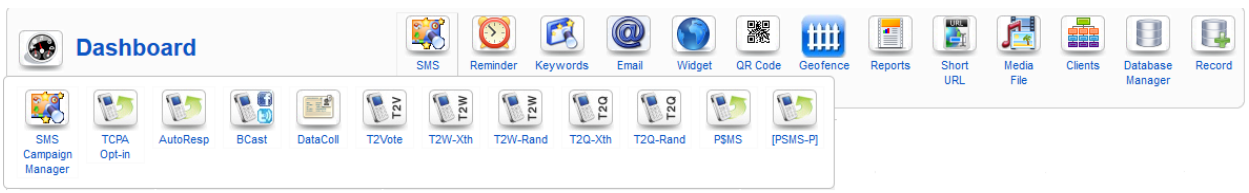
Broadcast

The **Broadcast** feature is a tool for distributing SMS messages. We provide you with many options, and yet it's quite easy to setup.

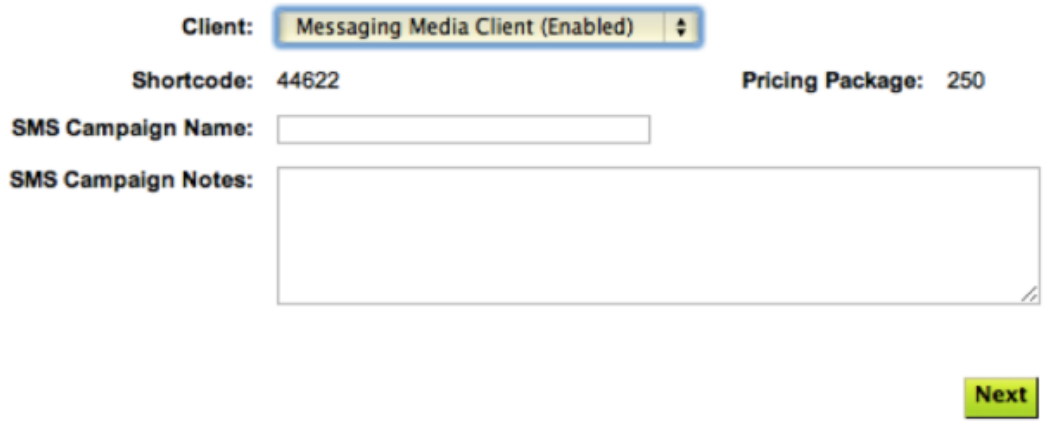
You may access this feature by choosing **SMS Campaign > SMS Campaign Manager > Broadcast** from the toolbar.



Don't forget that you can access the SMS Campaigns by utilizing the quick link icons that are located under the toolbar on the Dashboard.



After choosing this menu item, you will see a page much like the figure below.



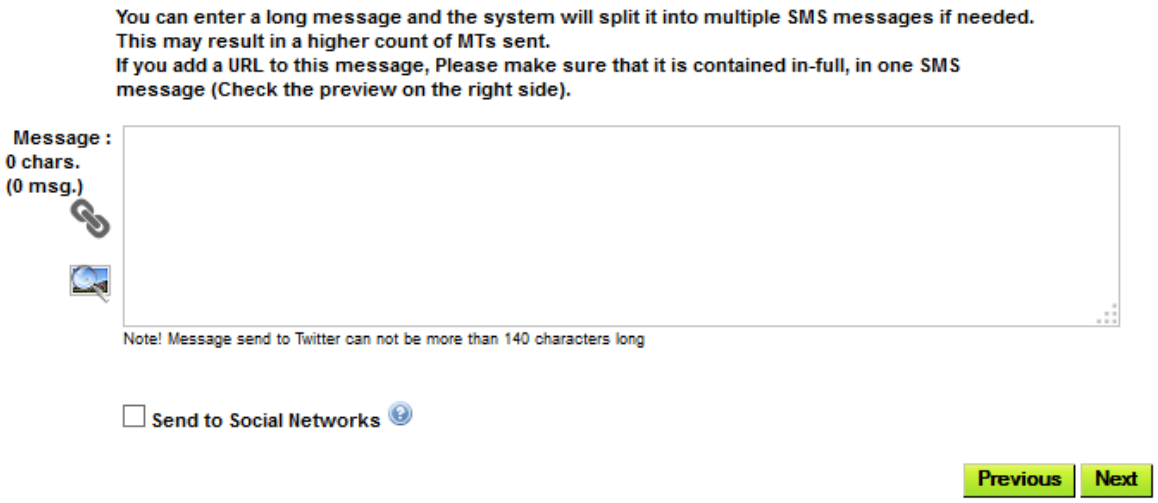
Broadcast Profile Summary

To begin, follow these steps:

1. Click the **Client** drop-down list, and then select the correct client name.
2. Enter a **SMS Campaign Name**.
3. Optionally, enter the **SMS Campaign Notes**.
4. When you're happy with the entries, click the **Next** button to continue on to the next step, **Message**.

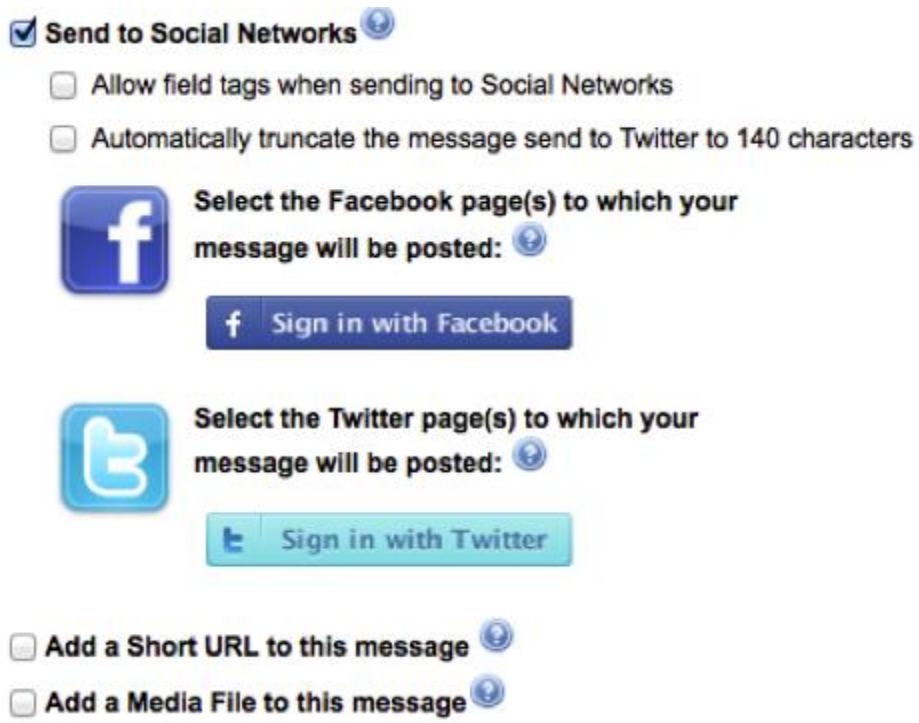
Message

In this step, you'll write the message and perhaps configure some options. Begin by entering the message. You can enter a long message and the system will split it into two or more SMS messages but this may result in a higher count of MT being sent. You will see in the preview on the right, how the messages will be split. Read below about the options that you can enable for the broadcast.


You can enter a long message and the system will split it into multiple SMS messages if needed.
This may result in a higher count of MTs sent.
If you add a URL to this message, Please make sure that it is contained in-full, in one SMS message (Check the preview on the right side).
Message :
0 chars.
(0 msg.)
Note! Message send to Twitter can not be more than 140 characters long
Send to Social Networks
Previous
Next

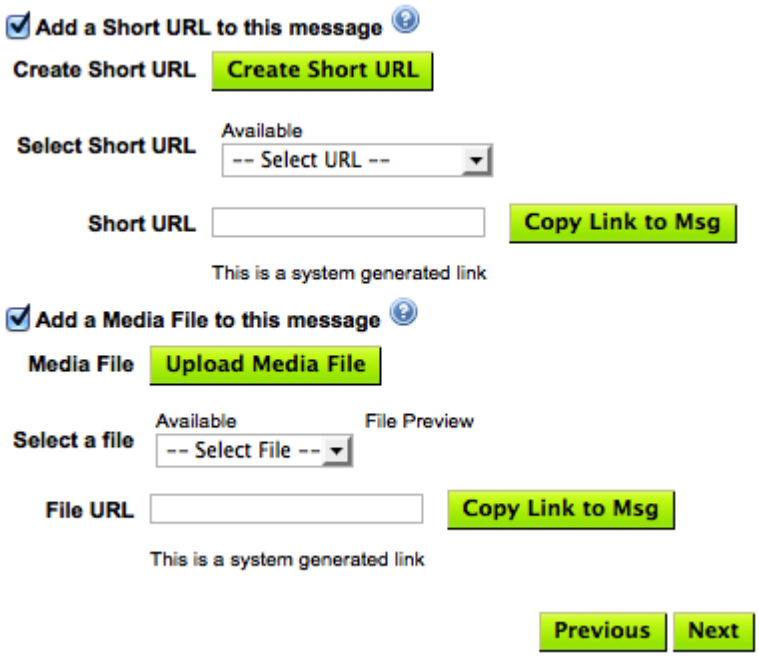
Send the message to Social Networks

1. To send the message to Facebook, Twitter, or both, and check the box for Send to Social Networks.
2. You may now click the **Yes** button for Facebook, Twitter or both.
3. Click the pencil icon if you don't see a default account, then enter the account details.


Send to Social Networks
Allow field tags when sending to Social Networks
Automatically truncate the message send to Twitter to 140 characters
Select the Facebook page(s) to which your message will be posted:
Sign in with Facebook
Select the Twitter page(s) to which your message will be posted:
Sign in with Twitter
Add a Short URL to this message
Add a Media File to this message

Adding a URL to the message

1. To add a system-generated hyperlink, check the box for **Add Short URL to this message**.
2. Click the **Create Short URL** button, then enter a **Title** and the **URL**. The **Title** will be the display text for the link.
3. In the **Select Short URL** drop-down list, choose the link you just made to display the URL in the **Short URL** field.
4. Now, click the **Copy Link to Msg** button to insert the link into the reply message text.

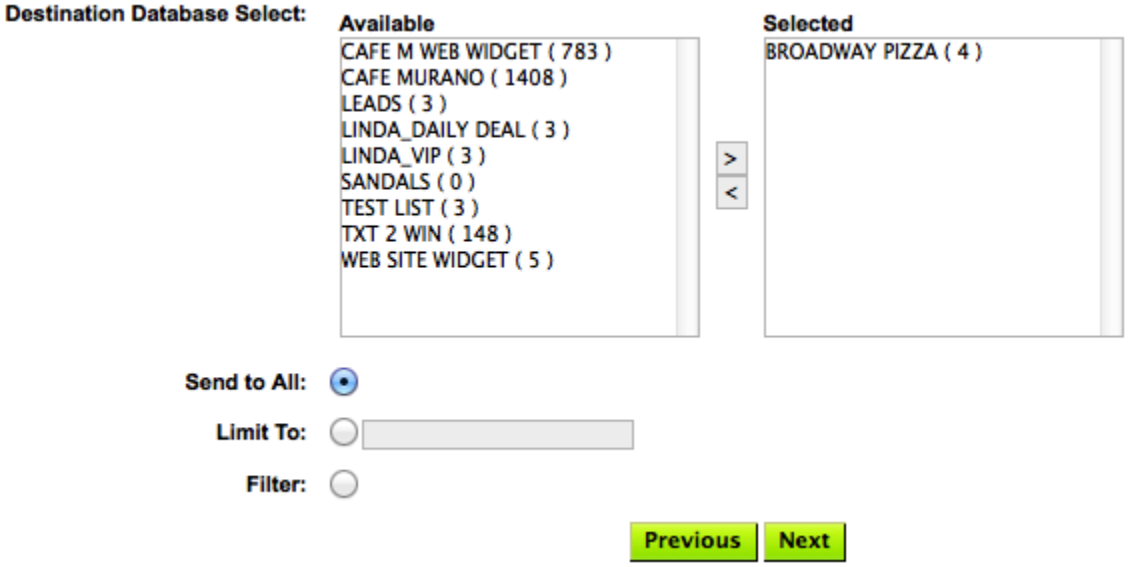


Adding a Media File to the message

1. To add a system-generated hyperlink to a media file, check the box for **Add a Media File to this message**.
2. Click the **Upload Media File** button, then enter a **Title** and then click the Browse button to upload the media file (**MM file**). The **Title** will be the display text for the media file link
3. In the **Select a file** drop-down list, choose the link you just made to display the URL in the **File URL** field.
4. Now, click the **Copy Link to Msg** button to insert the media file link into the reply message text.
5. Click **Next** to move on to the **Destination Database** step.

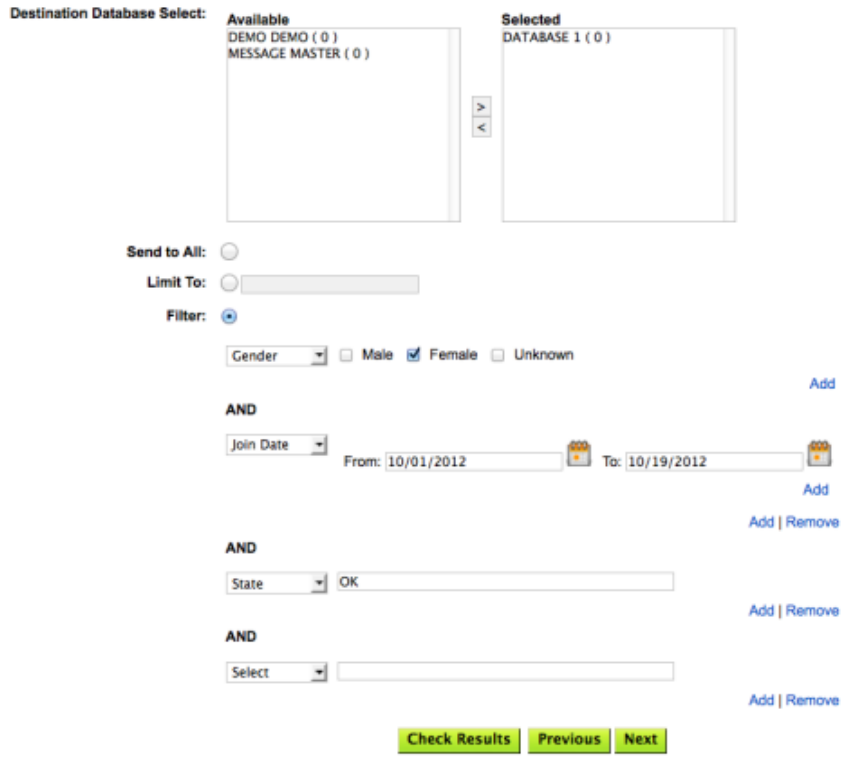
Destination Database

If at least one database already exists, you'll see it in the **Available** listing (see the figure below). Follow the steps below to manage your databases.



To choose one or more existing databases:

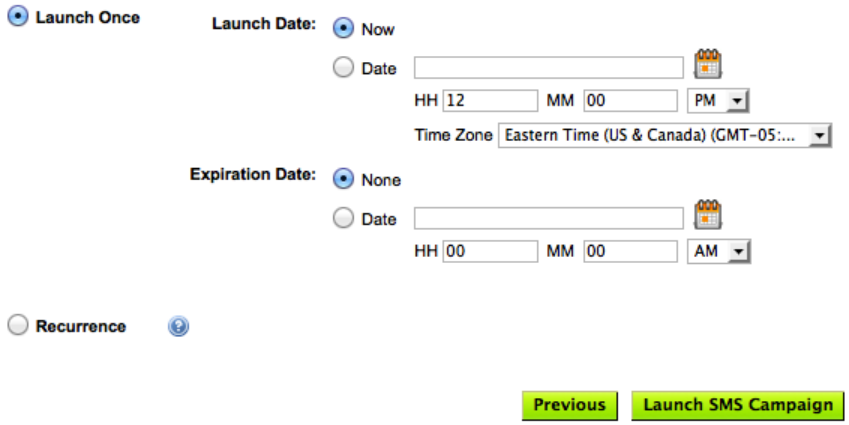
1. Click the database name in the **Available** listing, then click the right arrow to move the database name to the **Selected** listing.
2. One option to restrict the message distribution is **Limit To**. Click this radio button and then enter a value for the total number of messages that will be sent at random to the databases you've chosen.
3. You can also choose to restrict by database columns by clicking the **Filter** radio button. Then choose a field from the drop-down listing, and then choose a value. For example, you could choose **Carrier** from the drop-down listing and then select ***AT&T Wireless***. In this case, for the databases you've chosen, only those recipients whose records have AT&T Wireless as the carrier will receive a message.
4. Click the **Add** link to append another filter, and follow the instructions in step 3.



5. When you're happy with your changes, click **Next** to continue to the last step.

Launch & Expiration

This is the last step, in which you'll define the duration of the campaign by specifying the launch and expiration dates. The recurrence feature gives you the option of configuring multiple launches. The default settings are such that the campaign will begin immediately and have no expiration date.



Launch Once

Follow the steps below to configure a single launch:

Configure a Launch Date

1. If you want the campaign to launch immediately, click **Now**. If you want to specify a launch date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will begin.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

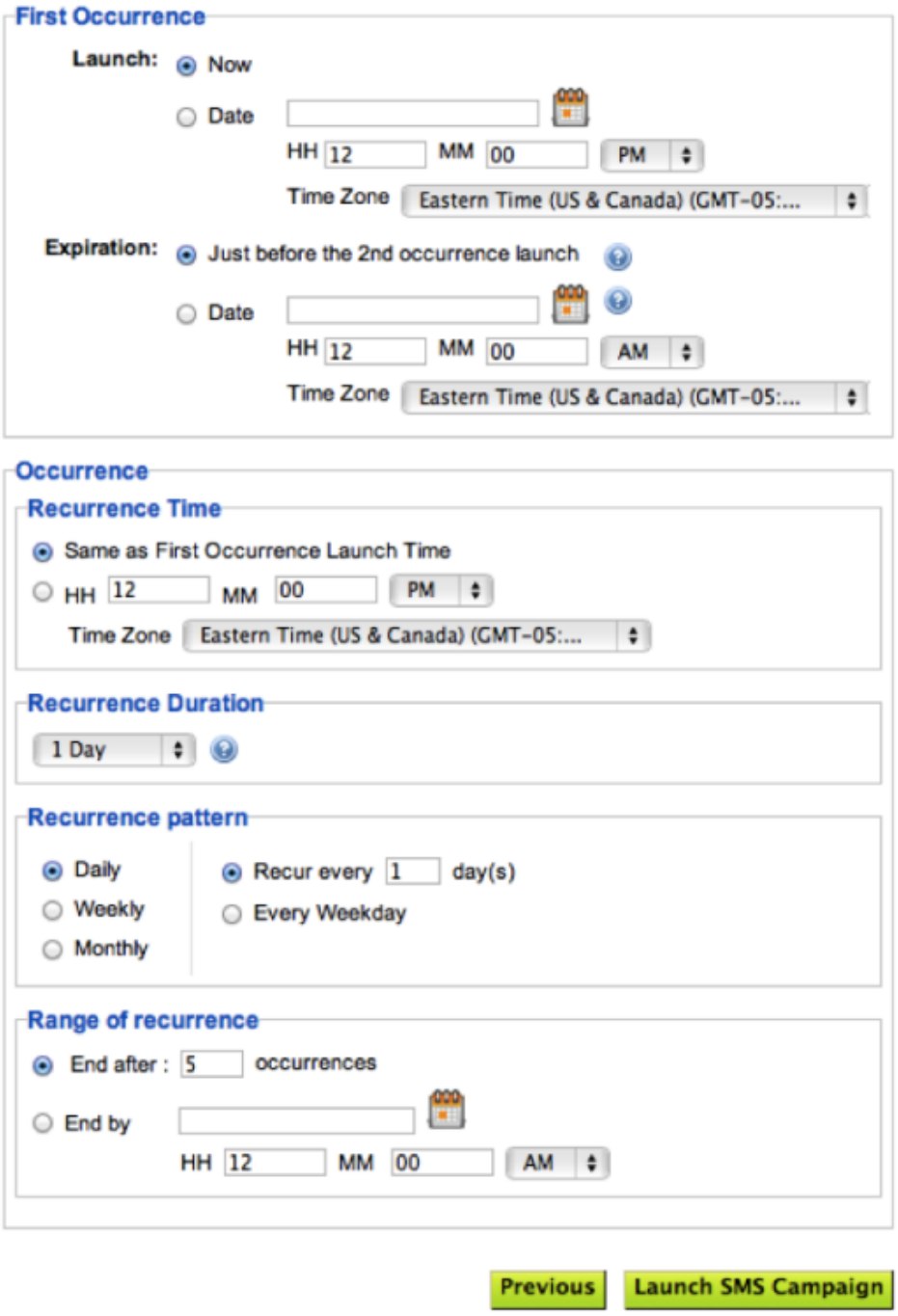
Configure an Expiration Date

1. If you want to specify an expiration date, click the **Date** radio button. If you don't want the campaign to expire click **None**.
2. Click the calendar icon to select a date on which the campaign will expire.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

You may click the **Previous** button to return to prior steps. If you're happy with all of the of the settings, click **Launch SMS Campaign** to commit your changes and return to the main page.

Recurrence

You may also launch, stop, and launch the broadcast repeatedly. Follow the steps below to configure multiple launches:



Configure a Launch Date for the First Occurrence

1. If you want to specify a launch date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will begin.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Configure an Expiration Date for the First Occurrence

1. If you want to specify an expiration date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will expire.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Occurrence

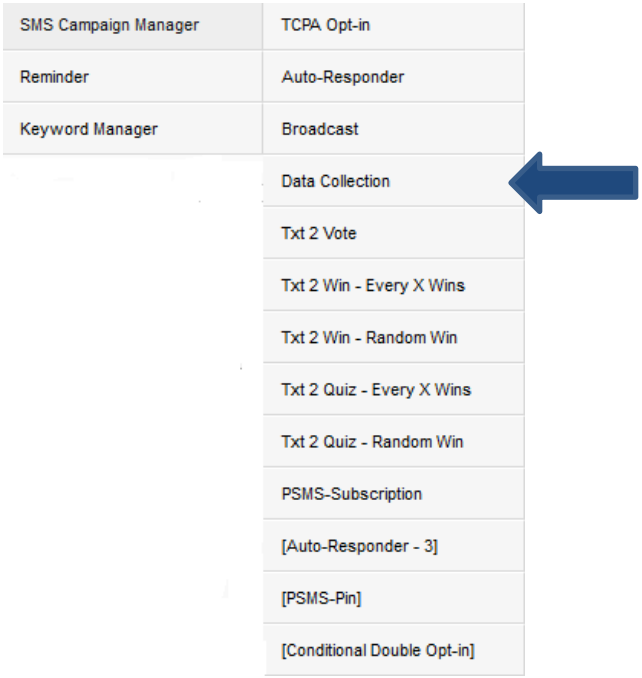
1. For **Recurrence Time**, you may leave the default setting, **Same as First Occurrence Launch Time**.
2. Otherwise check the second radio button and enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
3. Choose a **Time Zone**.
4. If you would like a **Recurrence Duration** different from the default (***1 Day***), select it from the drop-down list.
5. The default **Recurrence Pattern** is ***Daily/Recur every 1 day***. If you like, simply choose the options which match your preferences.
6. You may also specify the **Range of recurrence**. This can either end after a specific number of occurrences, or you can specify a date and time on which the distributions will end.

You may click the **Previous** button to return to prior steps. If you're happy with all of settings, click the **Launch SMS Campaign** to commit your changes and return to the main page.

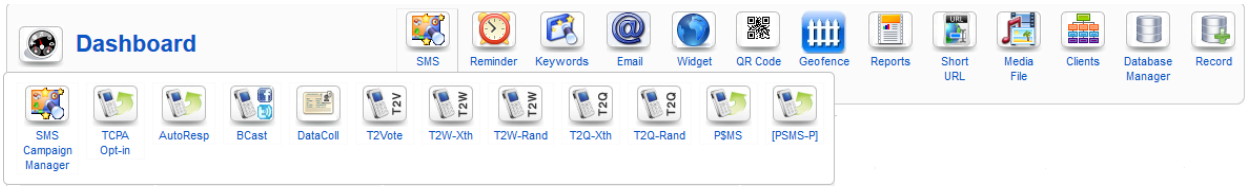
Data Collection

The **SMS Data Collection** feature is a tool for creating campaigns that solicit responses through SMS text messages. We provide you with many options, and yet it's quite easy to setup.

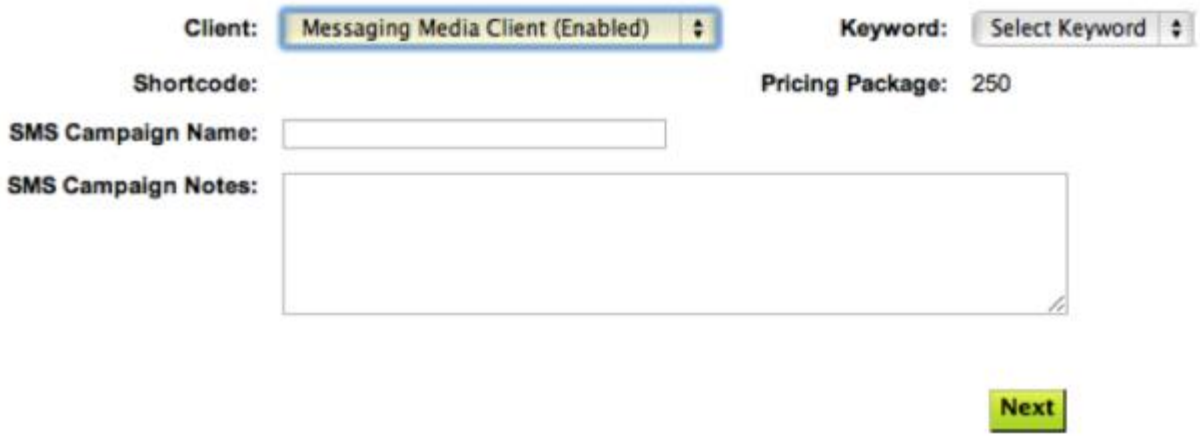
You may access the **Data Collection** feature by choosing **SMS Campaign > SMS Campaign Manager > Data Collection** from the toolbar.



Don't forget that you can access the SMS Campaigns by utilizing the quick link icons that are located under the toolbar on the Dashboard.



After choosing this menu item, you will see a page much like the figure below.



Entering a Profile Summary

To begin, follow these steps:

1. Click the **Client** drop-down list, and then select the correct client name.
2. Enter a **SMS Campaign Name**.
3. Optionally, enter the **SMS Campaign Notes**.
4. Also, choose a **Keyword** from the drop-down list (if any are available).
5. When you're happy with the entries, click the **Next** button to continue on to the next step, **Message**.

Message

In this step, you'll write the SMS message, specify the response type, and then configure the follow-up response. Think of it as a conversation template: here you are configuring the interaction between the SMS recipient and your campaign. Remember, at 160 characters the system will split your message. You can see preview the SMS messages to the right of the screen in SMS Preview.

Have a look at the figure below, and then follow these simple steps:

1. Enter the SMS **Message**.
2. From the **Expected Answer** drop-down list, choose the response type that you expect from the recipient. Naturally, the choice here must match the content of the **Message**. For example, if you choose ***DOB*** (date of birth) from the **Expected Answer** drop-down, then you will likely write something like "What is your birthday?" in the **Message**.
3. Next, decide which **Response** you want to generate when the recipient sends the reply. You may choose from the following:
    a. **Simple Response** - the simple response does not examine the value of the SMS reply. You may choose one of two response types, either **Send Message** or **Run SMS Campaign**. If you choose **Send Message**, your message content has a

160-character limit. If you choose **Run SMS Campaign**, choose a predefined campaign from the drop-down list.

> **NOTE**:You'll need to create and save at least one predefined campaign before it will appear in the drop-down listing.

b. **Dynamic Response** - this response examines the value of the SMS reply. We recommend this choice only if you have high confidence that your recipient will type a reply that contains a precise value. For example, if you chose ***Zip*** from the **Expected Answer** (see above), you might expect a specific numeric response in the SMS reply. If this is the case, then do the following:

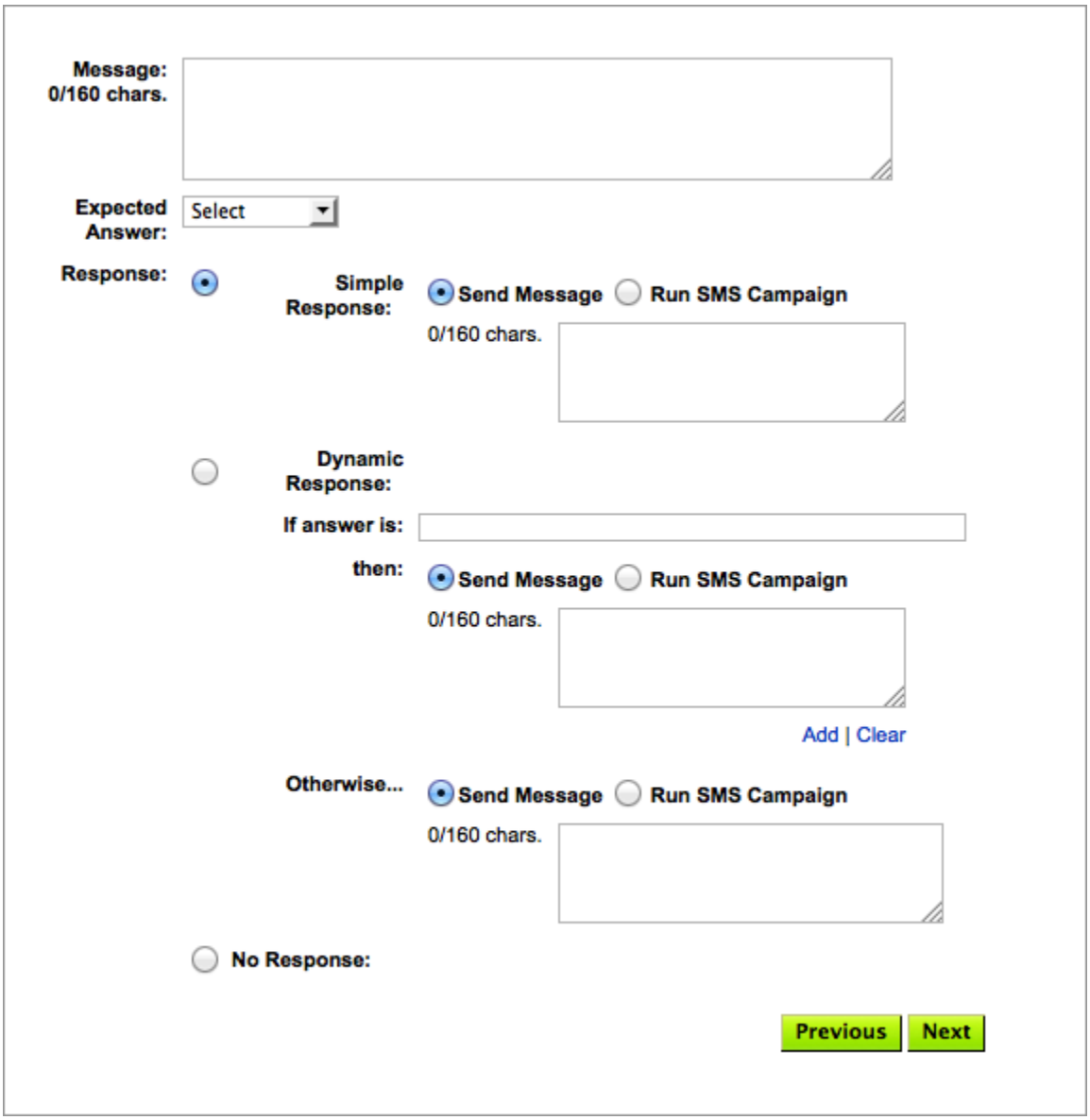
- Choose **Dynamic Response.**
- Enter a specific value in the **If answer is** field.
- You may choose one of two response types, either **Send Message** or **Run SMS Campaign**. If you choose **Send Message**, your message content has a 160-character limit. If you choose **Run SMS Campaign**, choose a predefined campaign from the drop-down list.
- Next, you'll need to specify the response for an SMS reply that doesn't match what you entered in the **If answer is** field. Simply choose either **Send Message** or **Run SMS Campaign**.

> **NOTE**: You'll need to create and save at least one predefined campaign before it will appear in the drop-down listing.

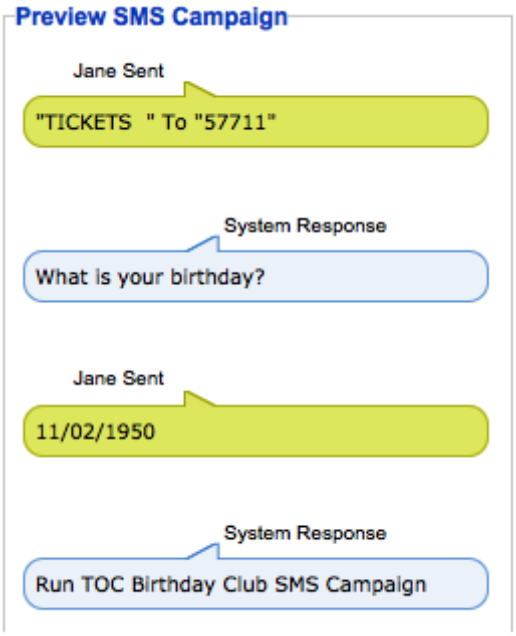
- Click Add to add another dynamic response item; click Clear to remove a dynamic response item.

c. **No Response** - Choose this option if you do not want to generate any response.

4. Click **Next** to move on to the **Destination Database** step.


Message:
0/160 chars.
Expected Answer:
Select
Response:
Simple Response:
Send Message
Run SMS Campaign
0/160 chars.
Dynamic Response:
If answer is:
then:
Send Message
Run SMS Campaign
0/160 chars.
Add | Clear
Otherwise...
Send Message
Run SMS Campaign
0/160 chars.
No Response:
Previous
Next

Preview



Before we move onto the next step, stop and have a look at this convenient feature. If you've been following along and entering values for the data collection campaign as we describe above, you'll notice- on the right side of the page- a graphic depiction of the campaign sequence. This preview will show you the SMS messages and if necessary where your message will be split (over 160 characters). We recommend that you think of it as a conversation template: here you are configuring the interaction between the SMS recipient and your campaign.

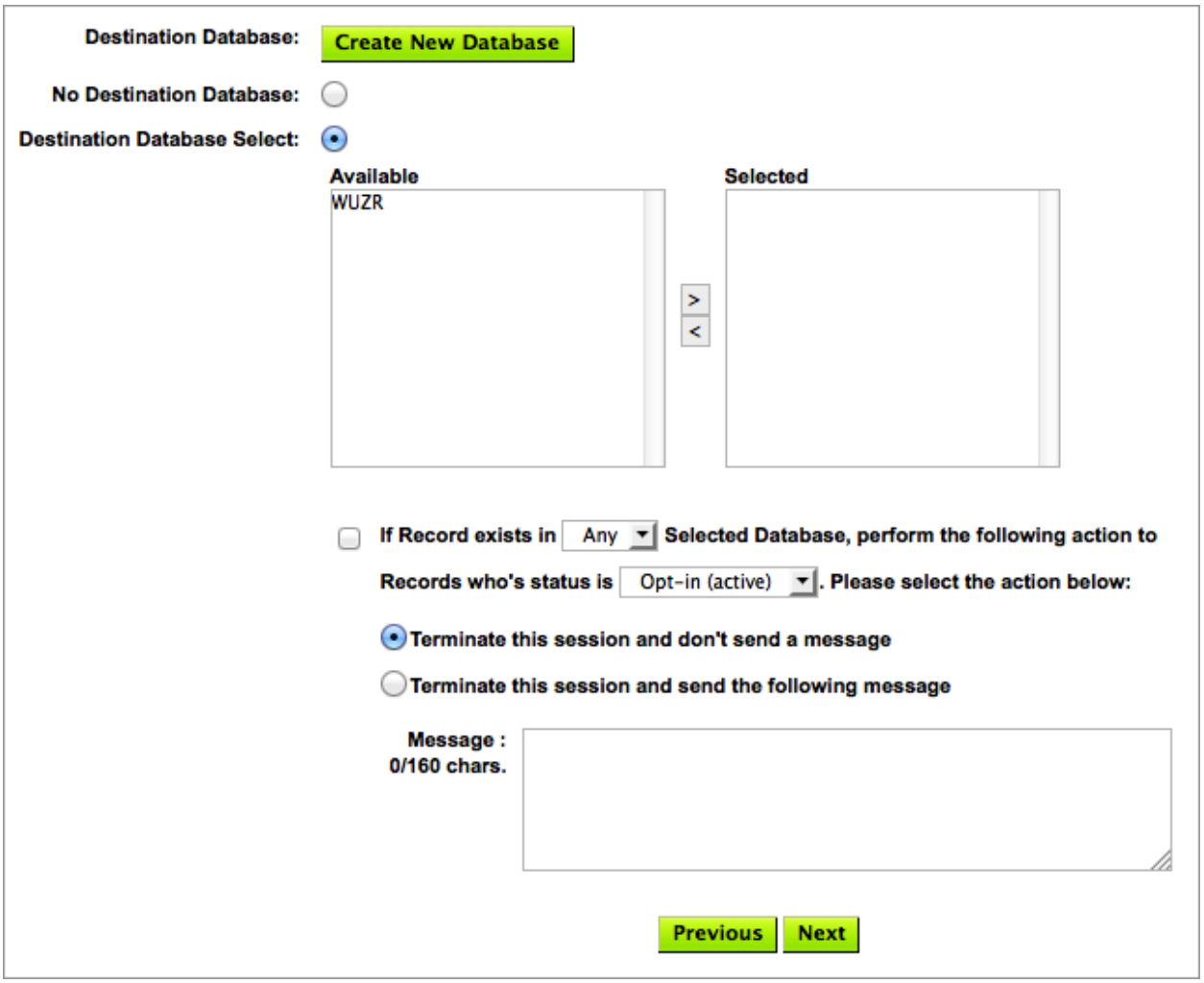
If you haven't already, click **Next** to move on to the **Destination Database** step.

Destination Database

In this step, you'll choose the database in which you want to store your campaign data. If no database exists, you may create one by following these steps:

1. Click **Create New Database**.
2. Enter a **Database Name**.
3. Check the box for **Send Subscription Renewal Msg?** if you want to send a monthly renewal message to your database.
4. Click **Submit** to commit your changes; click **Cancel** to discard.

If at least one database already exists, you'll see it in the **Available** listing (see the figure below). Follow the steps below to manage your databases.



To choose one or more existing databases:

1. Click the database name in the **Available** listing, then click the right arrow to move the database name to the **Selected** listing. You can also double-click on the database name to move it to the **Selected** side.
2. If you want to take action when a duplicate entry is found in a database, check the **If Record exists** box.
3. In the first drop-down, choose ***All*** if you want to this setting to apply only if a duplicate is found in all databases in the **Selected** listing. Leave the default (***Any***) if you want this setting if at least one duplicate is found in any of the databases.
4. In the second drop down, the default option is ***Opt-in (Active)***. If you leave this option, the setting will only apply to duplicate records having an opt-in value. Instead, you might choose **Opted-out (Inactive)** or ***Any***.

5. Next, decide what happens when a duplicate is found. You can choose to **Terminate this session and don't send a message**, or choose to send a message. If you choose the second option, then enter the **Message**.
6. When you're happy with your changes, click **Next** to continue to the last step.

Launch & Expiration

This is the last step, in which you'll define the duration of the campaign by specifying the launch and expiration dates. The default settings are such that the campaign will begin immediately and have no expiration date. Follow these simple steps if you want to modify either, or both:

Configure a Launch Date

1. If you want to specify a launch date, click the **Date** radio button. If not, click **Now**.
2. Click the calendar icon to select a date on which the campaign will begin.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Configure an Expiration Date

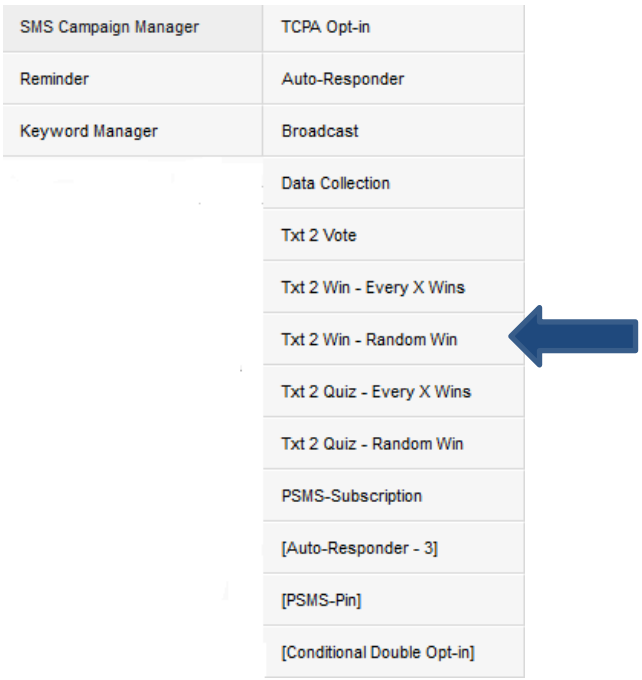
1. If you want to specify an expiration date, click the **Date** radio button. If not, click **None**.
2. Click the calendar icon to select a date on which the campaign will expire.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

You may click the **Previous** button to return to prior steps. If you're happy with all of the settings, click **Launch SMS Campaign** to commit your changes and return to the main page.

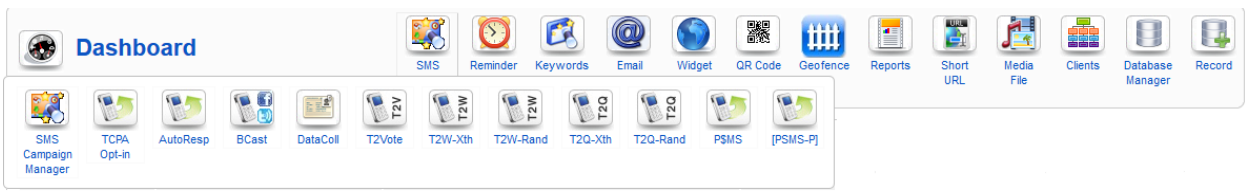
Txt 2 Quiz - Random Win

The **Txt 2 Quiz - Random Win** feature is a tool for creating simple campaigns that solicit SMS responses to a quizzing game in which the winning entries are chosen at random by the system. You specify the frequency of winning entries, the maximum number of winners, and several other options. It is easy to setup by following the instructions in this section.

You may access this feature by choosing **SMS Campaign > SMS Campaign Manager > Txt 2 Quiz Random Win** from the toolbar.



Don't forget that you can access the SMS Campaigns by utilizing the quick link icons that are located under the toolbar on the Dashboard.



After choosing this menu item, you will see a page much like the figure below.

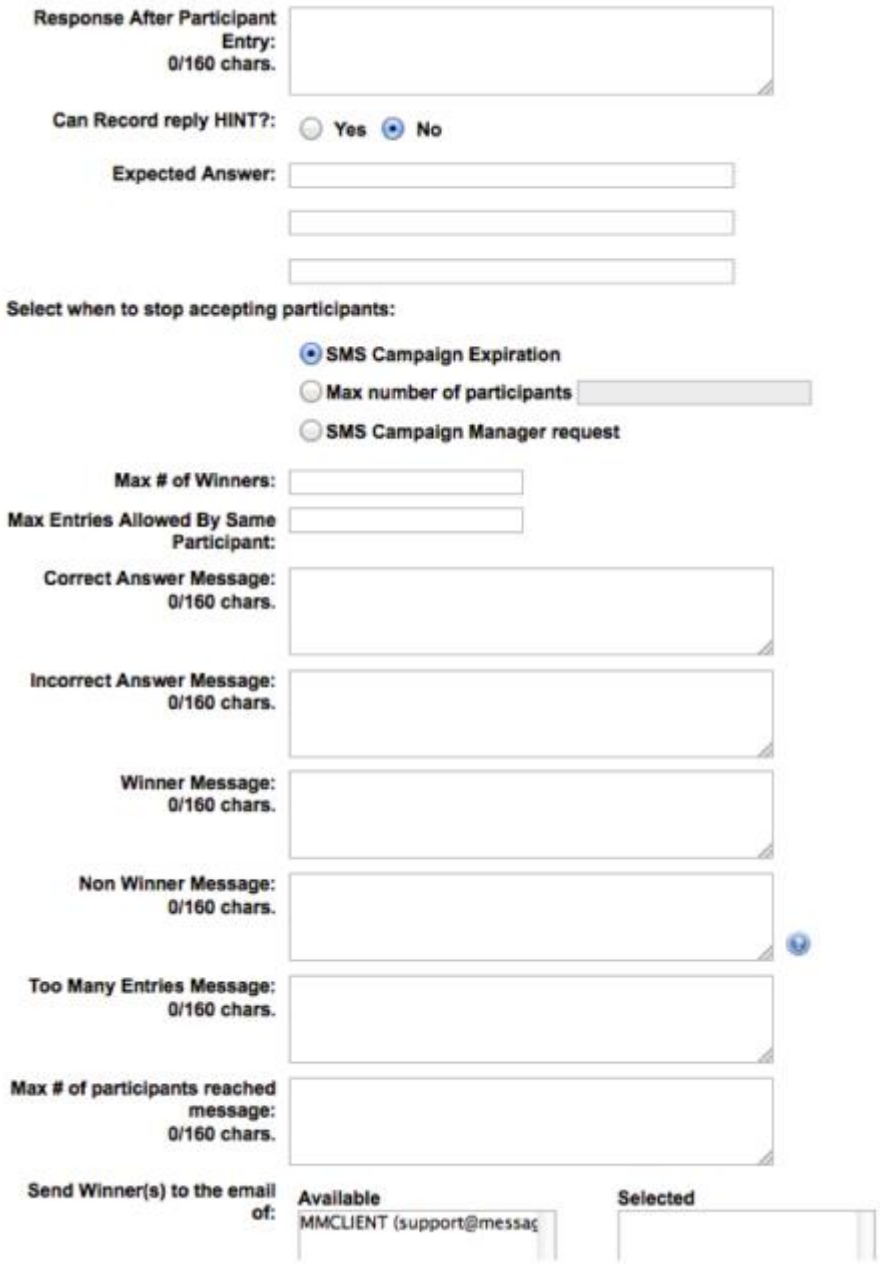
Profile Summary

To begin, follow these steps:

1. Click the **Client** drop-down list, and then select the correct client name.
2. Also, choose a **Keyword** from the drop-down list (if any are available).
3. Enter a **SMS Campaign Name**.
4. Optionally, enter the **SMS Campaign Notes**.
5. When you're happy with the entries, click the **Next** button to continue on to the next step, **Message**.

Message

In this step, you'll specify the frequency of winning entries, the maximum number of winners, and configure a number of options. Think of it as a conversation template: here you are configuring the interaction between the SMS recipient and your campaign. Remember, the maximum length of the message (and error message) is 160 characters.



Have a look at the figure, and then read below to learn the steps:

1. Begin by entering the **Response After Participant Entry**. This is the response message that will be sent to each participant when their entry message is received by the system.
2. Next, decide if you want to offer a hint. If so, choose **Yes** for **Can Record reply HINT?** and then enter the **Hit Message** and the **Expected Answer**.
3. Next, make a choice for **Select when to stop accepting participants**. The default setting is at the **SMS Campaign Expiration**, which is the date on which the campaign ends (see the Launch & Expiration section below). You can also stop accepting participants upon

reaching the **Max number of participants**, or at any time upon the **SMS Campaign Manager request**.

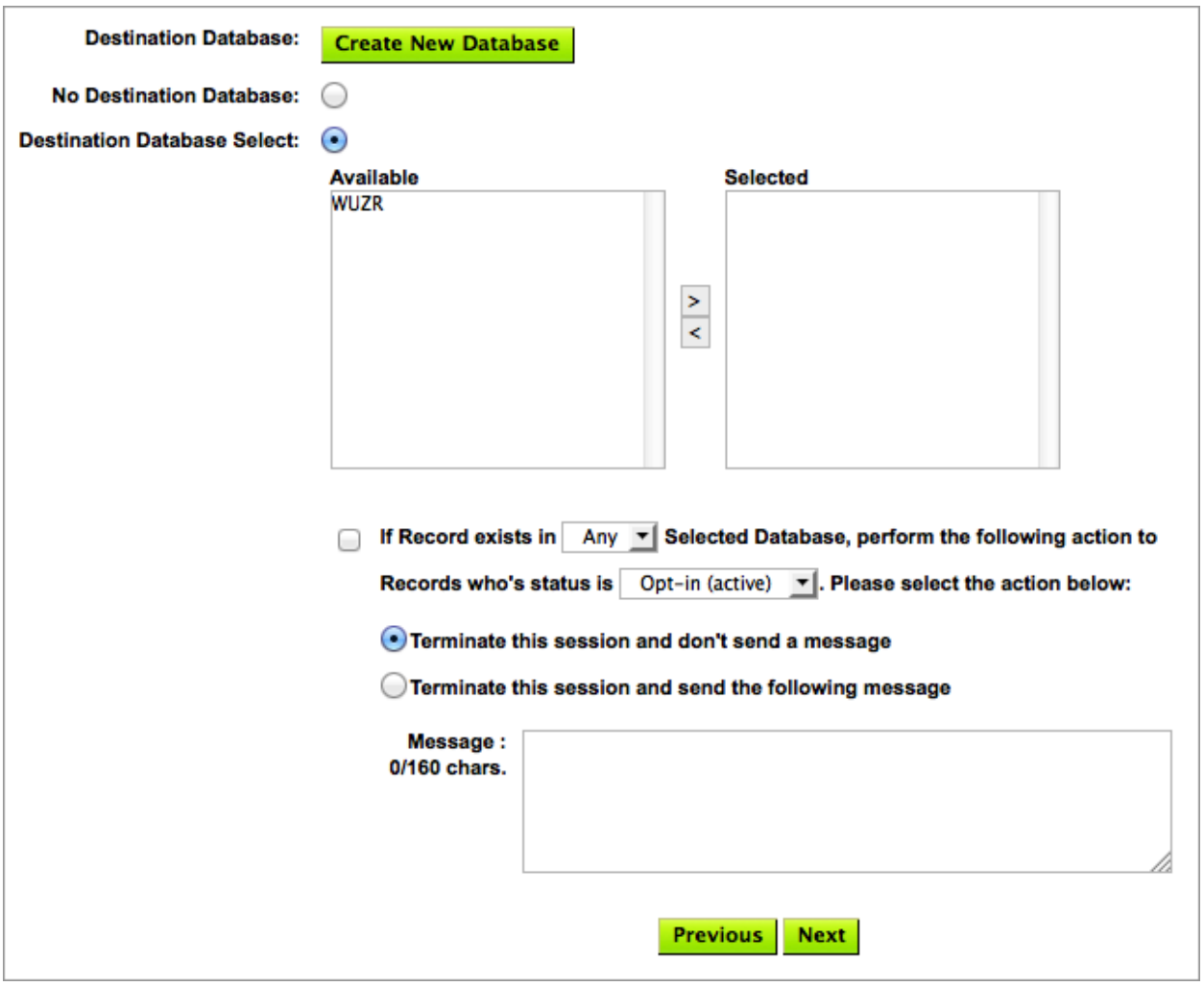
4. Place a limit on the number of winners by entering a value in the **Max # of Winners** field.
5. Limit the number of entries per SMS number by entering a value in the **Max Entries Allowed By Same Participant** field. For example, if you specify the value as "1", then only one entry per number is acceptable. If a participant exceeds this maximum, they will receive the message you write in the **Too Many Entries Message** field (see below).
6. Enter both a **Correct Answer Message** and an **Incorrect Answer Message**.
7. Each winning participant will receive the message you write into **Winner Message**. All others will receive the message you place into the **Non-Winner Message** field.
8. In the field **Too Many Entries Message**, enter the message that will be sent to those participants who attempt to exceed the **Max Entries Allowed by the Same Participant** (see above).
9. The contest is over when the **Max # of Winners** has been reached (see above). In the **Max # of Winners reached message** field, enter the message that will be sent to anyone who attempts to participate in the game after the contest is over.
9. Finally, you'll need to select the email address to which the winning numbers will be sent. For **Send Winner(s) to the email of**, select the email address from the **Available** listing by clicking the small arrow.
10. Click **Next** to move on to the **Destination Database** step.

Destination Database

In this step, you'll choose the database in which you want to store your campaign data. If no database exists, you may create one by following these steps:

1. Click **Create New Database**.
2. Enter a **Database Name**.
3. Check the box for **Send Subscription Renewal Msg?** if you want to send a monthly renewal message to your database.
4. Click **Submit** to commit your changes; click **Cancel** to discard.

If at least one database already exists, you'll see it in the **Available** listing (see the figure below). Follow the steps below to manage your databases.



To choose one or more existing databases:

1. Click the database name in the **Available** listing, then click the right arrow to move the database name to the **Selected** listing.
2. If you want to take action when a duplicate entry is found in a database, check the **If Record exists** box.
3. In the first drop-down, choose ***All*** if you want to this setting to apply only if a duplicate is found in all databases in the **Selected** listing. Leave the default (***Any***) if you want this setting if at least one duplicate is found in any of the databases.
4. In the second drop down, the default option is ***Opt-in (Active)***. If you leave this option, the setting will only apply to duplicate records having an opt-in value. Instead, you might choose **Opted-out (Inactive)** or ***Any***.

5. Next, decide what happens when a duplicate is found. You can choose to **Terminate** this session and don't send a message, or choose to send a message. If you choose the second option, then enter the **Message**.
6. When you're happy with your changes, click **Next** to continue to the last step.

Launch & Expiration

This is the last step, in which you'll define the duration of the campaign by specifying the launch and expiration dates. The default settings are such that the campaign will begin immediately and have no expiration date. Follow these simple steps if you want to modify either, or both:

Configure a Launch Date

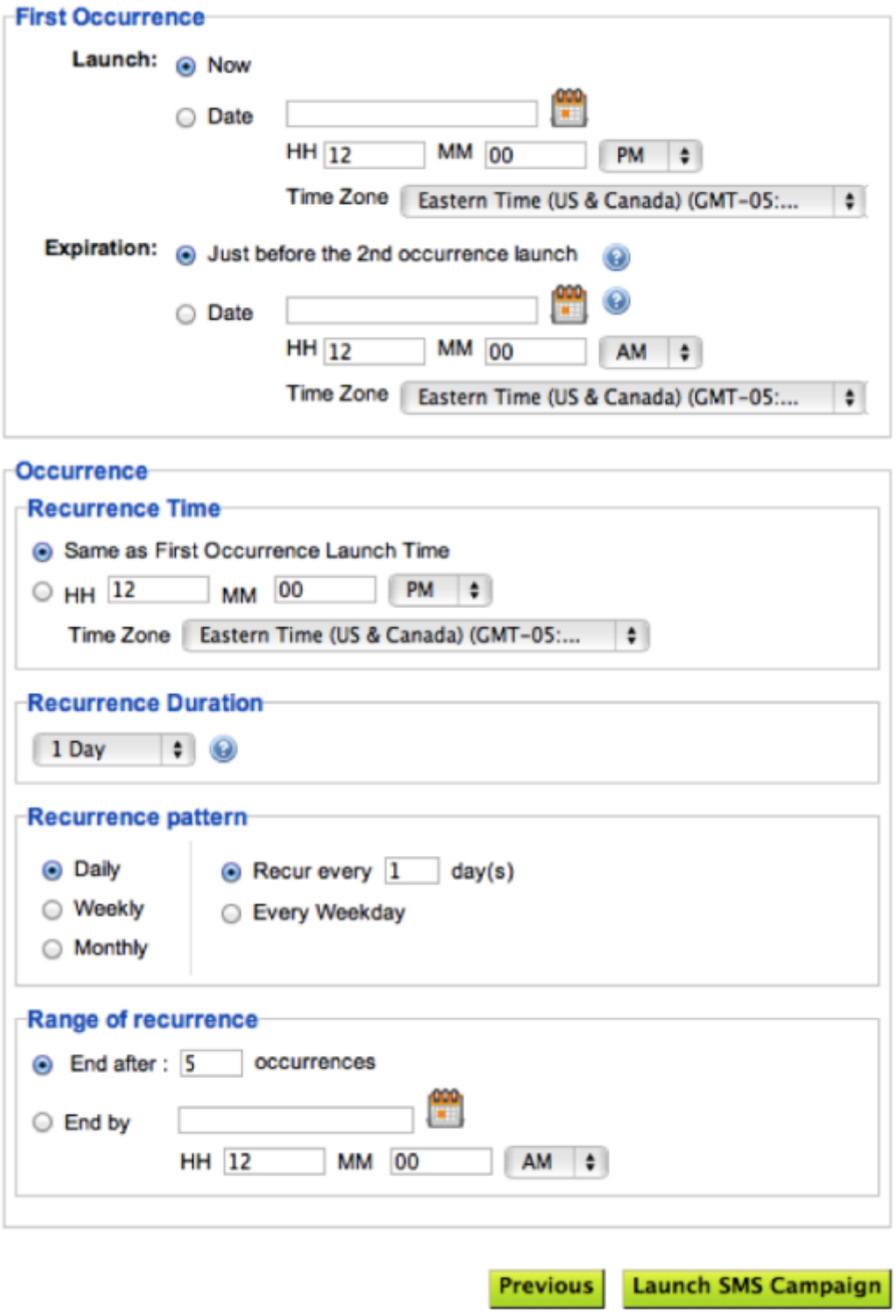
1. If you want to specify a launch date, click the **Date** radio button. If not, click **Now**.
2. Click the calendar icon to select a date on which the campaign will begin.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Configure an Expiration Date

1. If you want to specify an expiration date, click the **Date** radio button. If not, click **None**.
2. Click the calendar icon to select a date on which the campaign will expire.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Recurrence

You may also launch, stop, and launch the broadcast repeatedly. Follow the steps below to configure multiple launches:


First Occurrence
Launch:
Now
Date
HH 12
MM 00
PM
Time Zone
Eastern Time (US & Canada) (GMT-05:...
Expiration:
Just before the 2nd occurrence launch
Date
HH 12
MM 00
AM
Time Zone
Eastern Time (US & Canada) (GMT-05:...
Occurrence
Recurrence Time
Same as First Occurrence Launch Time
HH 12
MM 00
PM
Time Zone
Eastern Time (US & Canada) (GMT-05:...
Recurrence Duration
1 Day
Recurrence pattern
Daily
Weekly
Monthly
Recur every 1 day(s)
Every Weekday
Range of recurrence
End after : 5 occurrences
End by
HH 12
MM 00
AM
Previous
Launch SMS Campaign

Configure a Launch Date for the First Occurrence

1. If you want to specify a launch date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will begin.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Configure an Expiration Date for the First Occurrence

1. If you want to specify an expiration date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will expire.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Occurrence

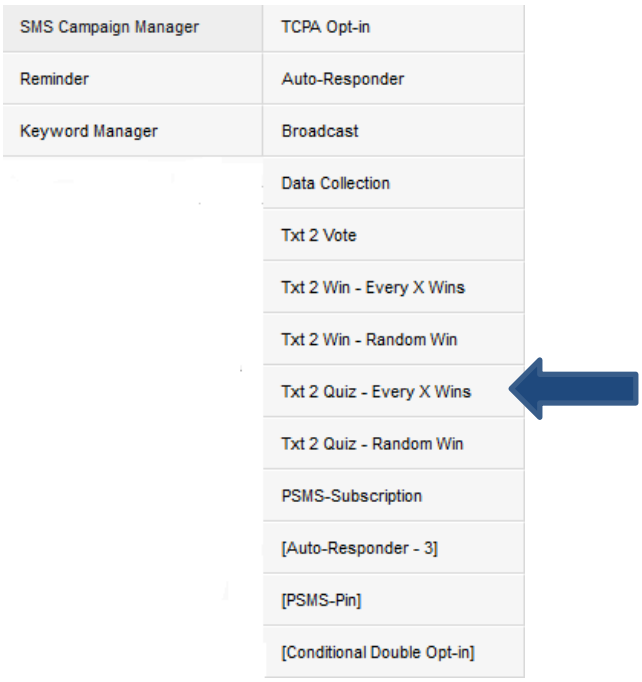
1. For **Recurrence Time**, you may leave the default setting, **Same as First Occurrence Launch Time**.
2. Otherwise check the second radio button and enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
3. Choose a **Time Zone**.
4. If you would like a **Recurrence Duration** different from the default (***1 Day***), select it from the drop-down list.
5. The default **Recurrence Pattern** is ***Daily/Recur every 1 day***. If you like, simply choose the options which match your preferences.
6. You may also specify the **Range of recurrence**. This can either end after a specific number of occurrences, or you can specify a date and time on which the distributions will end.

You may click the **Previous** button to return to prior steps. If you're happy with all of the of the settings, click **Launch SMS Campaign** to commit your changes and return to the main page.

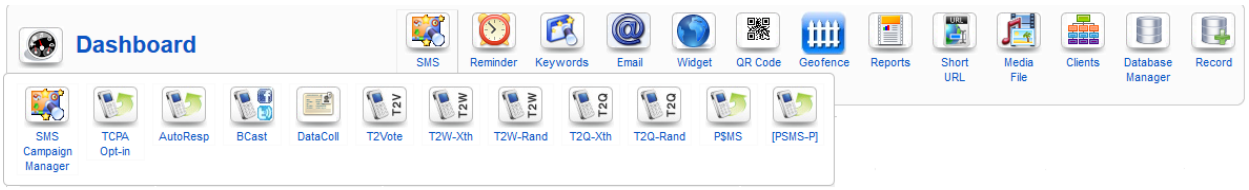
Txt 2 Quiz - Every X Wins

The **Txt 2 Quiz** feature is a tool for creating simple campaigns that solicit SMS responses to a quizzing game in which the winning entries occur at regular intervals. You specify the frequency of winning entries, the maximum number of winners, and several other options. It is easy to setup by following the instructions in this section.

You may access this feature by choosing **SMS Campaign > SMS Campaign Manager > Txt 2 Quiz - Every X Wins** from the toolbar.



Don't forget that you can access the SMS Campaigns by utilizing the quick link icons that are located under the toolbar on the Dashboard.



After choosing this menu item, you will see a page much like the figure below.

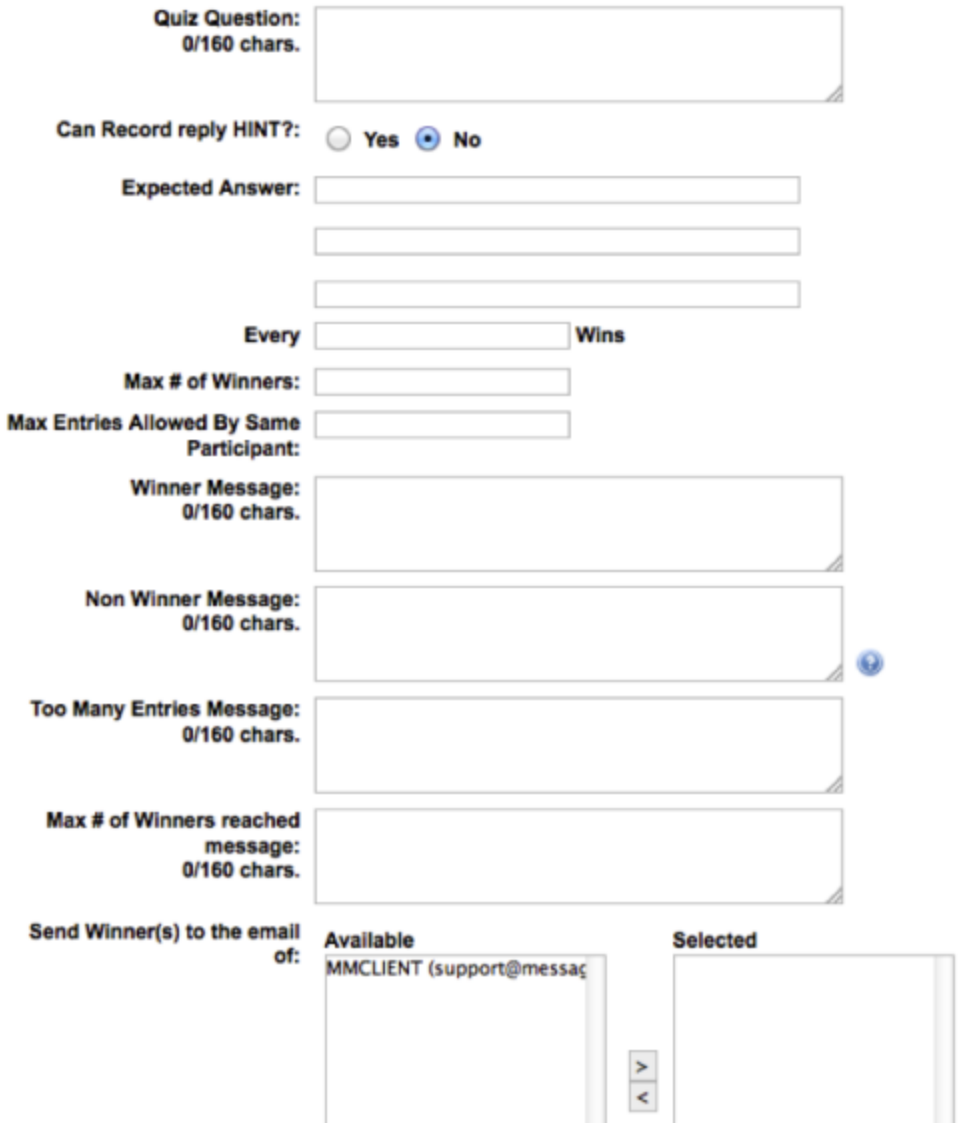
Profile Summary

To begin, follow these steps:

1. Click the **Client** drop-down list, and then select the correct client name.
2. Also, choose a **Keyword** from the drop-down list (if any are available).
3. Enter a **SMS Campaign Name**.
4. Optionally, enter the **SMS Campaign Notes**.
5. When you're happy with the entries, click the **Next** button to continue on to the next step, **Message**.

Message

In this step, you'll specify the frequency of winning entries, the maximum number of winners, and configure a number of options. Think of it as a conversation template: here you are configuring the interaction between the SMS recipient and your campaign. Remember, the maximum length of the message (and error message) is 160 characters.



Have a look at the figure, and then read below to learn the steps:

1. Begin by entering the **Quiz Question**. This is the initial question that is sent to each participant.
2. Next, decide if you want to offer a hint. If so, choose **Yes** for **Can Record reply HINT?** and then enter the **Hit Message** and the **Expected Answer**.
3. Enter a value for **Every X Wins**. This is the win frequency. If, for example, you enter "50", then 1 out of every 50 replies will be a winner.
4. Place a limit on the number of winners by entering a value in the **Max # of Winners** field.
5. Limit the number of entries per SMS number by entering a value in the **Max Entries Allowed By Same Participant** field. For example, if you specify the value as "1", then only one entry per number is acceptable. If a participant exceeds this maximum, they will receive the message you write in the **Too Many Entries Message** field (see below).

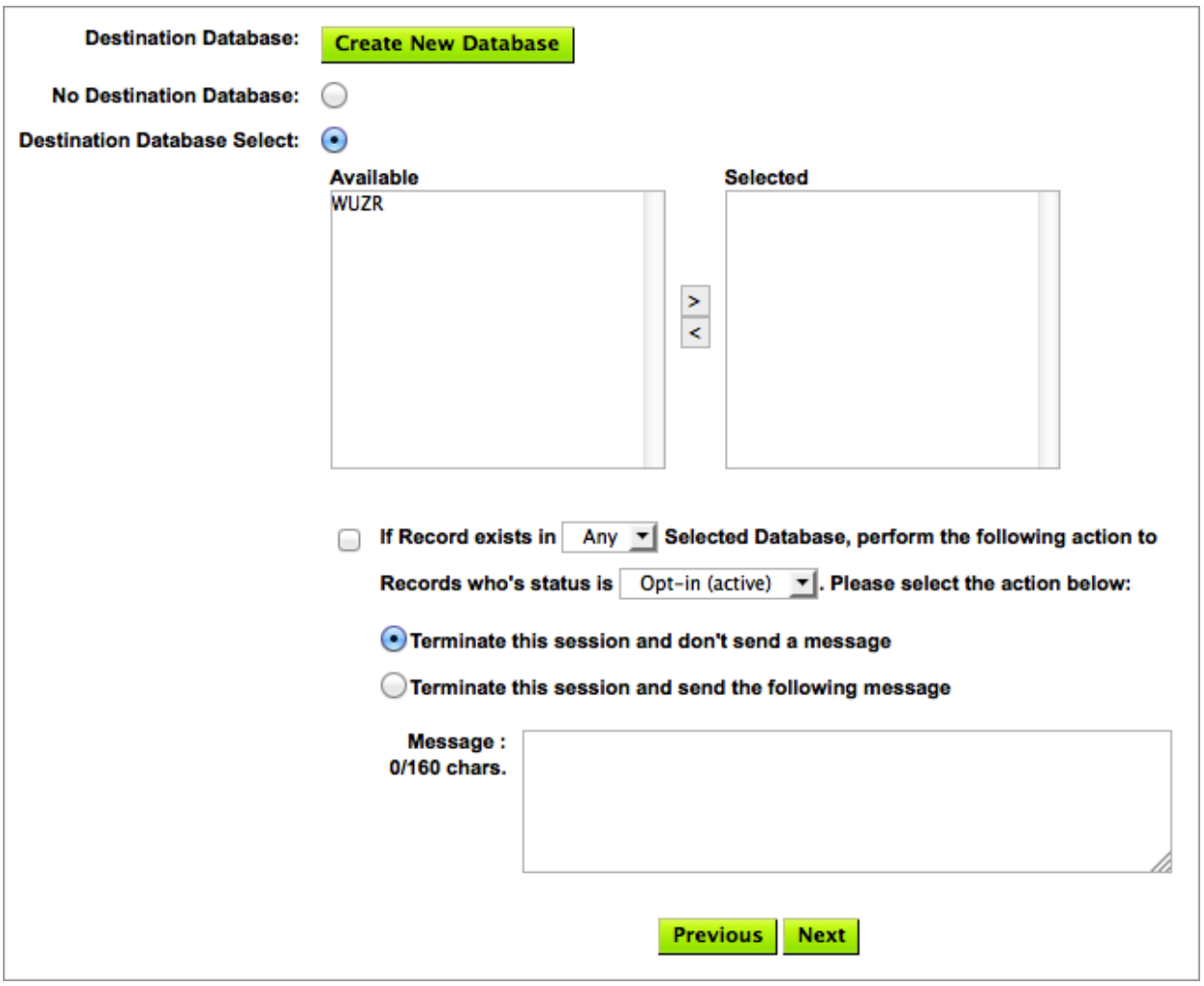
6. Every winning participant will receive the message you write into **Winner Message**. All others will receive the message you place into the **Non-Winner Message** field.
7. In the field **Too Many Entries Message**, enter the message that will be sent to those participants who attempt to exceed the **Max Entries Allowed by the Same Participant** (see above).
8. The contest is over when the **Max # of Winners** has been reached (see above). In the **Max # of Winners reached message** field, enter the message that will be sent to anyone who attempts to participate in the game after the contest is over.
9. Finally, you'll need to select the email address to which the winning numbers will be sent. For **Send Winner(s) to the email of**, select the email address from the **Available** listing by clicking the small arrow.
10. Click **Next** to move on to the **Destination Database** step.

Destination Database

In this step, you'll choose the database in which you want to store your campaign data. If no database exists, you may create one by following these steps:

1. Click **Create New Database**.
2. Enter a **Database Name**.
3. Check the box for **Send Subscription Renewal Msg?** if you want to send a monthly renewal message to your database.
4. Click **Submit** to commit your changes; click **Cancel** to discard.

If at least one database already exists, you'll see it in the **Available** listing (see the figure below). Follow the steps below to manage your databases.



To choose one or more existing databases:

1. Click the database name in the **Available** listing, then click the right arrow to move the database name to the **Selected** listing.
2. If you want to take action when a duplicate entry is found in a database, check the **If Record exists** box.
3. In the first drop-down, choose ***All*** if you want to this setting to apply only if a duplicate is found in all databases in the **Selected** listing. Leave the default (***Any***) if you want this setting if at least one duplicate is found in any of the databases.
4. In the second drop down, the default option is ***Opt-in (Active)***. If you leave this option, the setting will only apply to duplicate records having an opt-in value. Instead, you might choose **Opted-out (Inactive)** or ***Any***.

5. Next, decide what happens when a duplicate is found. You can choose to **Terminate** this session and don't send a message, or choose to send a message. If you choose the second option, then enter the **Message**.
6. When you're happy with your changes, click **Next** to continue to the last step.

Launch & Expiration

This is the last step, in which you'll define the duration of the campaign by specifying the launch and expiration dates. The default settings are such that the campaign will begin immediately and have no expiration date. Follow these simple steps if you want to modify either, or both:

Configure a Launch Date

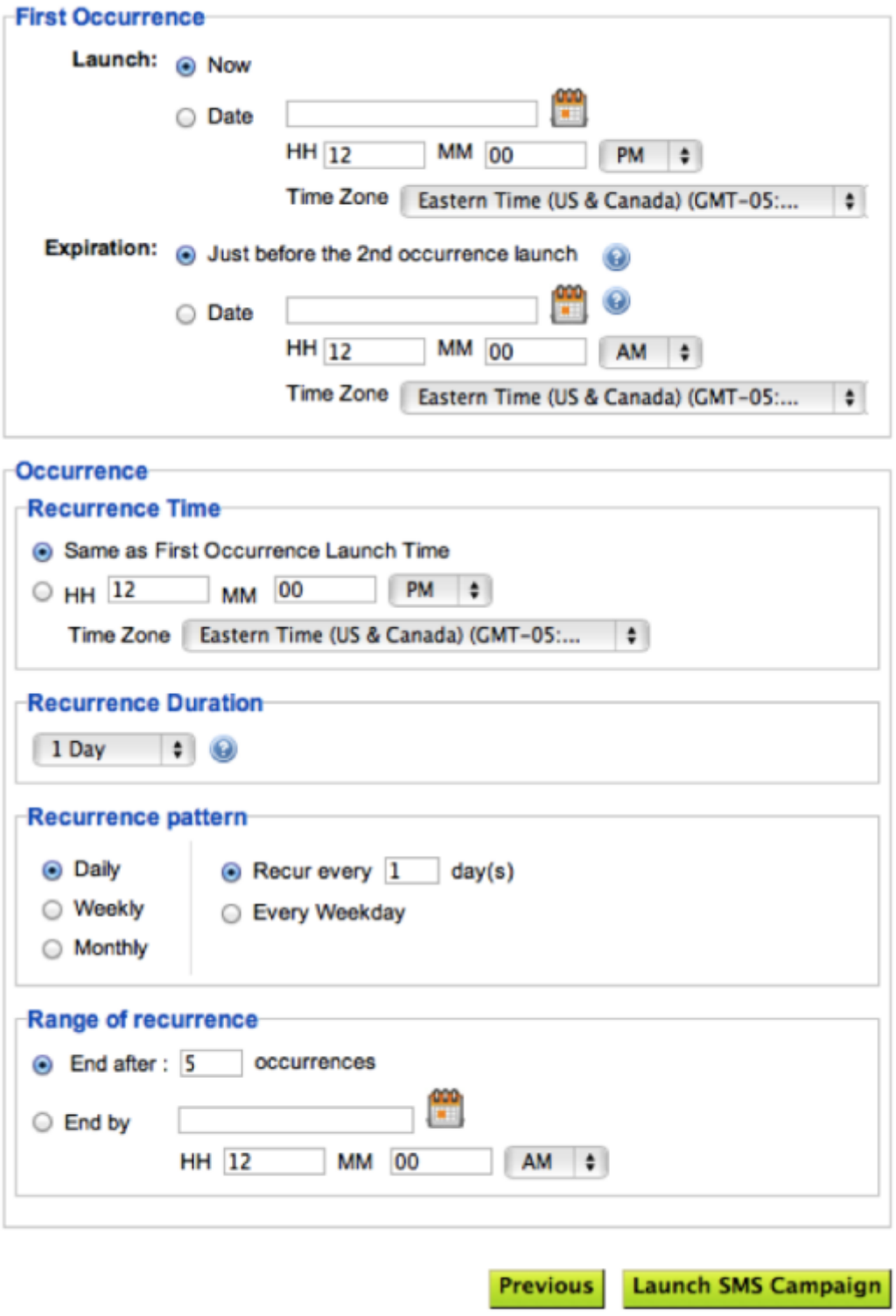
1. If you want to specify a launch date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will begin.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Configure an Expiration Date

1. If you want to specify an expiration date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will expire.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Recurrence

You may also launch, stop, and launch the broadcast repeatedly. Follow the steps below to configure multiple launches:


First Occurrence
Launch:
Now
Date
HH 12
MM 00
PM
Time Zone
Eastern Time (US & Canada) (GMT-05:...
Expiration:
Just before the 2nd occurrence launch
Date
HH 12
MM 00
AM
Time Zone
Eastern Time (US & Canada) (GMT-05:...
Occurrence
Recurrence Time
Same as First Occurrence Launch Time
HH 12
MM 00
PM
Time Zone
Eastern Time (US & Canada) (GMT-05:...
Recurrence Duration
1 Day
Recurrence pattern
Daily
Weekly
Monthly
Recur every 1 day(s)
Every Weekday
Range of recurrence
End after : 5 occurrences
End by
HH 12
MM 00
AM
Previous
Launch SMS Campaign

Configure a Launch Date for the First Occurrence

1. If you want to specify a launch date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will begin.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Configure an Expiration Date for the First Occurrence

1. If you want to specify an expiration date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will expire.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Occurrence

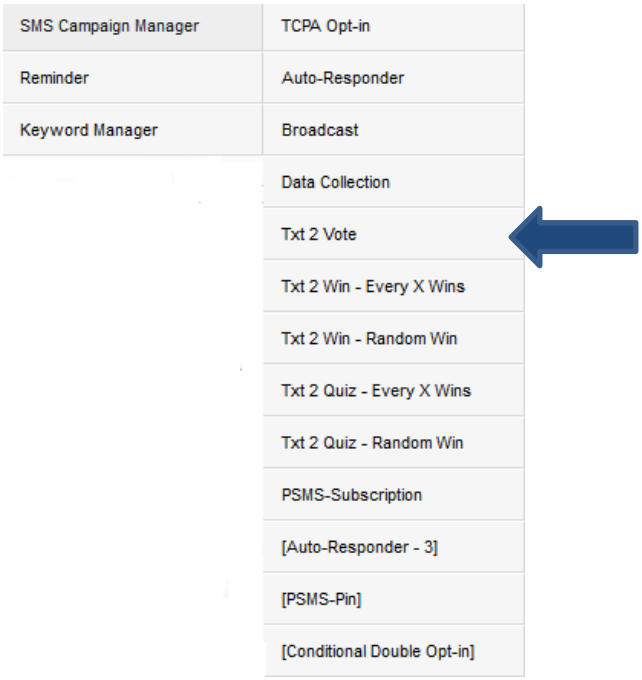
1. For **Recurrence Time**, you may leave the default setting, **Same as First Occurrence Launch Time**.
2. Otherwise check the second radio button and enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
3. Choose a **Time Zone**.
4. If you would like a **Recurrence Duration** different from the default (***1 Day***), select it from the drop-down list.
5. The default **Recurrence Pattern** is ***Daily/Recur every 1 day***. If you like, simply choose the options which match your preferences.
6. You may also specify the **Range of recurrence**. This can either end after a specific number of occurrences, or you can specify a date and time on which the distributions will end.

You may click the **Previous** button to return to prior steps. If you're happy with all of the of the settings, click **Launch SMS Campaign** to commit your changes and return to the main page.

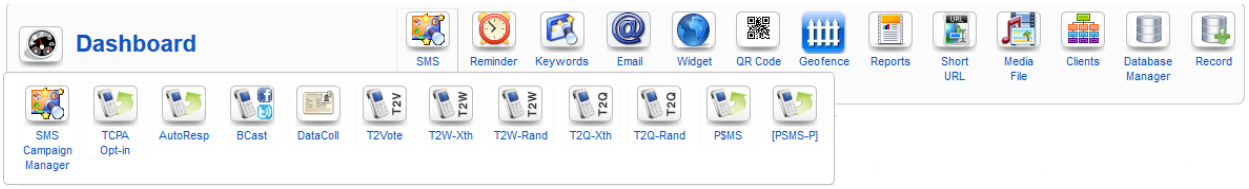
Txt 2 Vote

The **Txt 2 Vote** feature is a tool for creating simple campaigns that solicit voting responses through SMS text messages. We provide you with many options, and yet it's quite easy to setup.

You may access this feature by choosing **SMS Campaign > SMS Campaign Manager > Txt 2 Vote** from the toolbar.



Don’t forget that you can access the SMS Campaigns by utilizing the quick link icons that are located under the toolbar on the Dashboard.



After choosing this menu item, you will see a page much like the figure below.

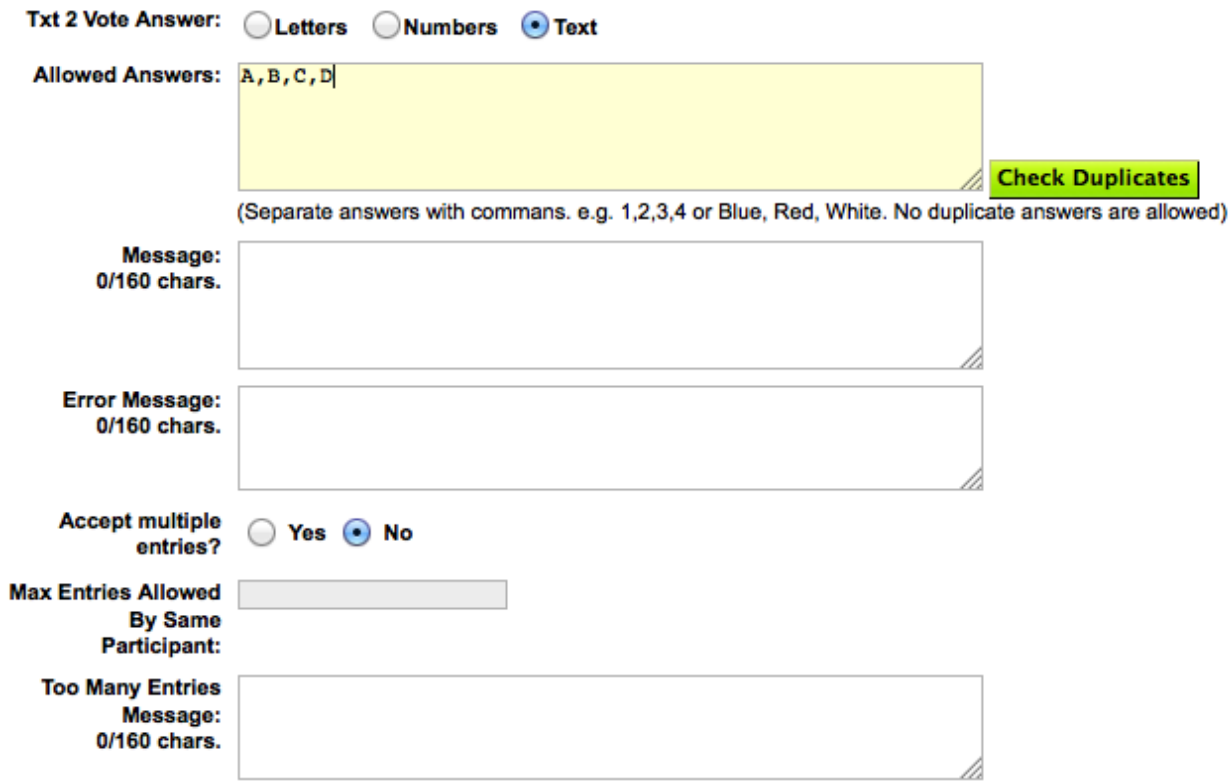
Profile Summary

To begin, follow these steps:

1. Click the **Client** drop-down list, and then select the correct client name.
2. Also, choose a **Keyword** from the drop-down list (if any are available).
3. Enter a **SMS Campaign Name**.
4. Optionally, enter the **SMS Campaign Notes**.
5. When you're happy with the entries, click the **Next** button to continue on to the next step, **Message**.

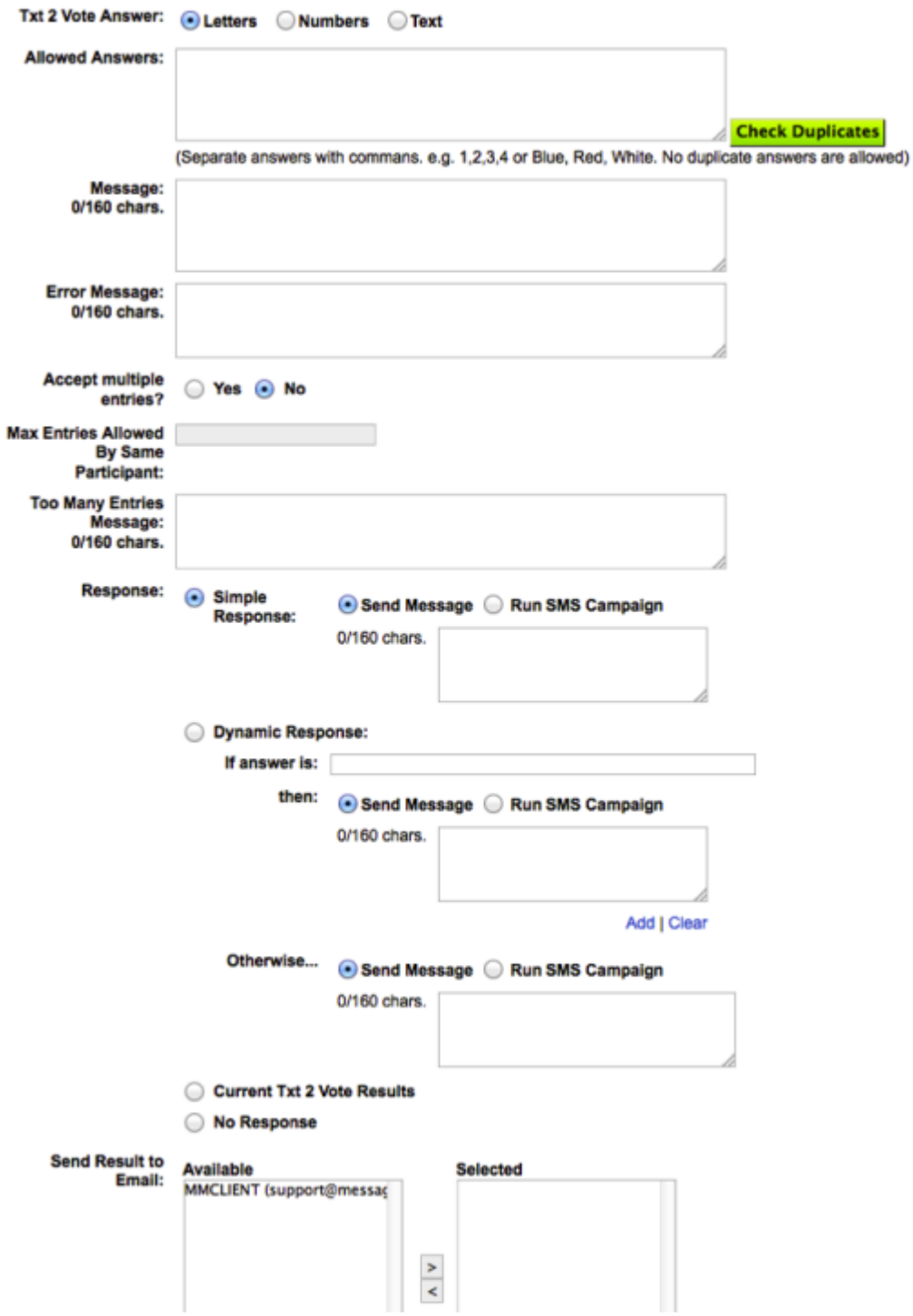
Message

In this step, you'll specify the voting answers, write the primary message and the error message, and configure a number of options. Think of it as a conversation template: here you are configuring the interaction between the SMS recipient and your campaign. Remember, the maximum length of the message (and error message) is 160 characters.



Have a look at the figure, and then read below to learn the steps:

1. Begin by entering the **Allowed Answers**. This can be a list of numbers or letters, such as "A,B,C,D" You can click the **Check Duplicates** button to ensure that each item in the list is unique.
2. Enter a **Message** containing instructions on how to vote.
3. Also enter an **Error Message**, which will contain instructions for the recipient to correct their previous message.
4. If you want to allow multiple choices in the response, click **Yes** to **Accept Multiple Entries**.
5. If you want to limit participant response, specify the **Maximum Entries Allowed By Same Participant** , and also enter the **Too Many Entries Message**.
6. Next, decide which **Response** you want to generate when the recipient sends the reply.



You may choose from the following:

a. **Simple Response** - the simple response does not examine the value of the SMS reply. You may choose one of two responses types, either **Send Message** or **Run SMS Campaign**. If you choose **Send Message**, your message content has a 160-character limit. If you choose **Run SMS Campaign**, choose a predefined campaign from the drop-down list.

NOTE:You'll need to create and save at least one predefined campaign before it will appear in the drop-down listing.

b. **Dynamic Response** - this response examines the value of the SMS reply. We recommend this choice only if you have high confidence that your recipient will type a reply that contains a precise value. For example, if you chose ***Zip*** from the **Expected Answer** (see above), you might expect a specific numeric response in the SMS reply. If this is the case, then do the following:

- Choose **Dynamic Response.**
- Enter a specific value in the **If answer is** field.
- You may choose one of two responses types, either **Send Message** or **Run SMS Campaign**. If you choose **Send Message**, your message content has a 160-character limit. If you choose **Run SMS Campaign**, choose a predefined campaign from the drop-down list.
- Next, you'll need to specify the response for an SMS reply that doesn't match what you entered in the **If answer is** field. Simply choose either **Send MessageRun SMS Campaign** or

NOTE:You'll need to create and save at least one predefined campaign before it will appear in the drop-down listing.

- Click Add to add another dynamic response item; click Clear to remove a dynamic response item.

b. **Current Txt 2 Vote Results**- this option will generate a simple reply containing the vote results.

d. **No Response** - Choose this option if you do not want to generate any response.

4. You can also send all responses to an email address of your choosing. Simply select one or more email addresses in the **Send Result to Email listing**.
5. Click **Next** to move on to the **Destination Database** step.

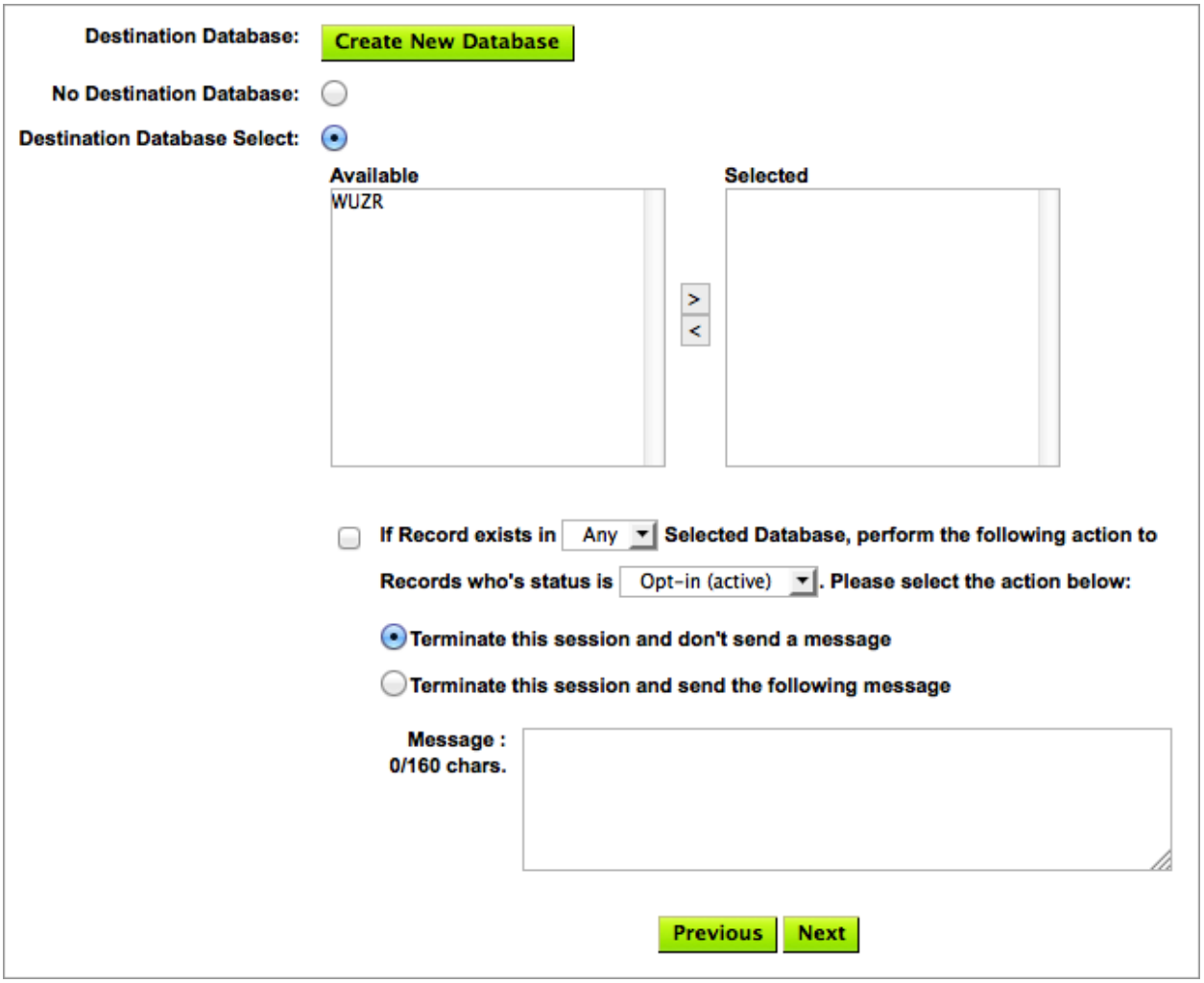
Destination Database

In this step, you'll choose the database in which you want to store your campaign data. If no database exists, you may create one by following these steps:

1. Click **Create New Database**.
2. Enter a **Database Name**.

3. Check the box for **Send Subscription Renewal Msg?** if you want to send a monthly renewal message to your database.
4. Click **Submit** to commit your changes; click **Cancel** to discard.

If at least one database already exists, you'll see it in the **Available** listing (see the figure below). Follow the steps below to manage your databases.



To choose one or more existing databases:

1. Click the database name in the **Available** listing, then click the right arrow to move the database name to the **Selected** listing.
2. If you want to take action when a duplicate entry is found in a database, check the **If Record exists** box.

3. In the first drop-down, choose ***All*** if you want to this setting to apply only if a duplicate is found in all databases in the **Selected** listing. Leave the default (***Any***) if you want this setting if at least one duplicate is found in any of the databases.
4. In the second drop down, the default option is ***Opt-in (Active)***. If you leave this option, the setting will only apply to duplicate records having an opt-in value. Instead, you might choose **Opted-out (Inactive)** or ***Any***.
5. Next, decide what happens when a duplicate is found. You can choose to **Terminate** this session and don't send a message, or choose to send a message. If you choose the second option, then enter the **Message**.
6. When you're happy with your changes, click **Next** to continue to the last step.

Launch & Expiration

This is the last step, in which you'll define the duration of the campaign by specifying the launch and expiration dates. The default settings are such that the campaign will begin immediately and have no expiration date. Follow these simple steps if you want to modify either, or both:

Configure a Launch Date

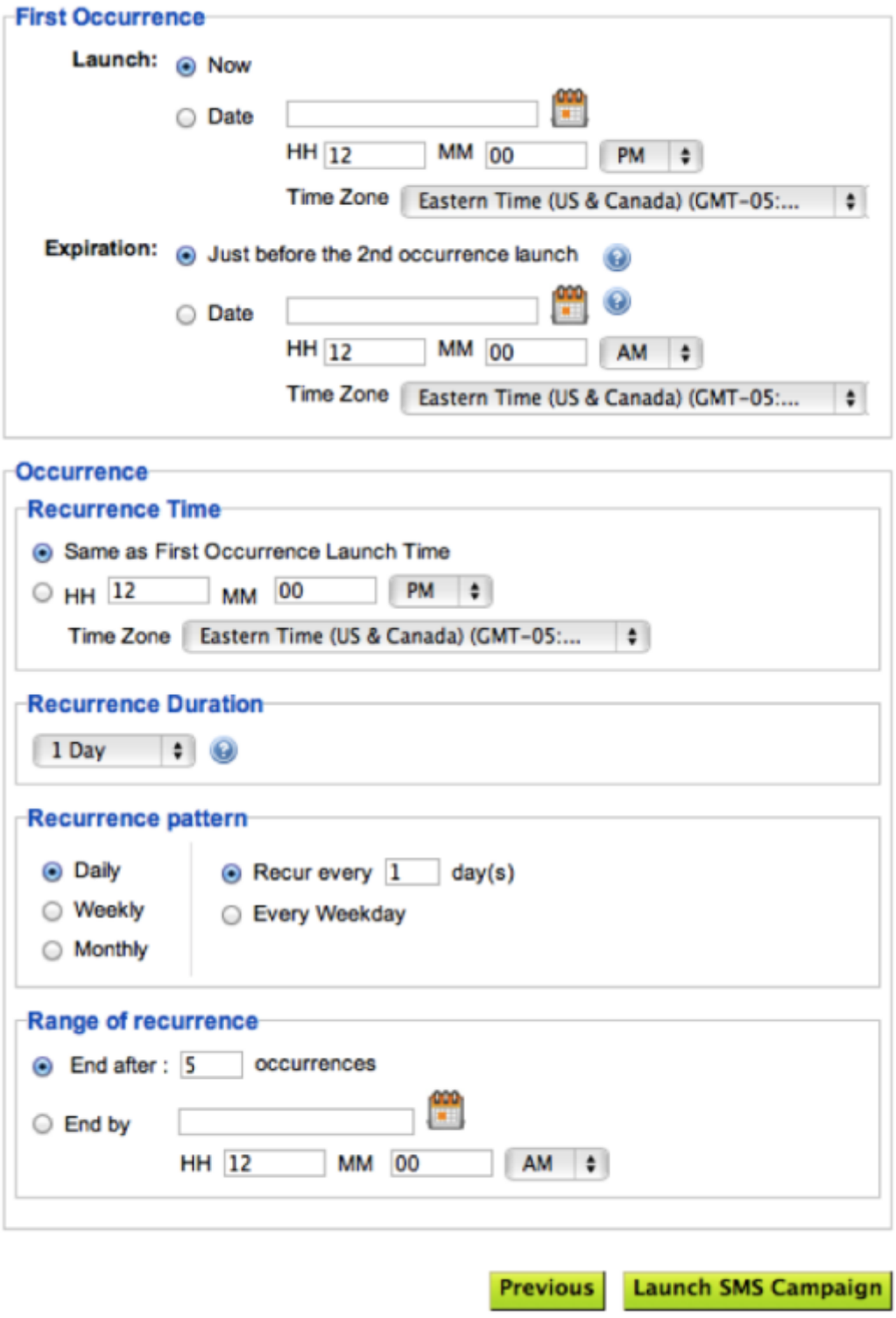
1. If you want to specify a launch date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will begin.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Configure an Expiration Date

1. If you want to specify an expiration date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will expire.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Recurrence

You may also launch, stop, and launch the broadcast repeatedly. Follow the steps below to configure multiple launches:


First Occurrence
Launch:
Now
Date
HH 12
MM 00
PM
Time Zone
Eastern Time (US & Canada) (GMT-05:...
Expiration:
Just before the 2nd occurrence launch
Date
HH 12
MM 00
AM
Time Zone
Eastern Time (US & Canada) (GMT-05:...
Occurrence
Recurrence Time
Same as First Occurrence Launch Time
HH 12
MM 00
PM
Time Zone
Eastern Time (US & Canada) (GMT-05:...
Recurrence Duration
1 Day
Recurrence pattern
Daily
Weekly
Monthly
Recur every 1 day(s)
Every Weekday
Range of recurrence
End after : 5 occurrences
End by
HH 12
MM 00
AM
Previous
Launch SMS Campaign

Configure a Launch Date for the First Occurrence

1. If you want to specify a launch date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will begin.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Configure an Expiration Date for the First Occurrence

1. If you want to specify an expiration date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will expire.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Occurrence

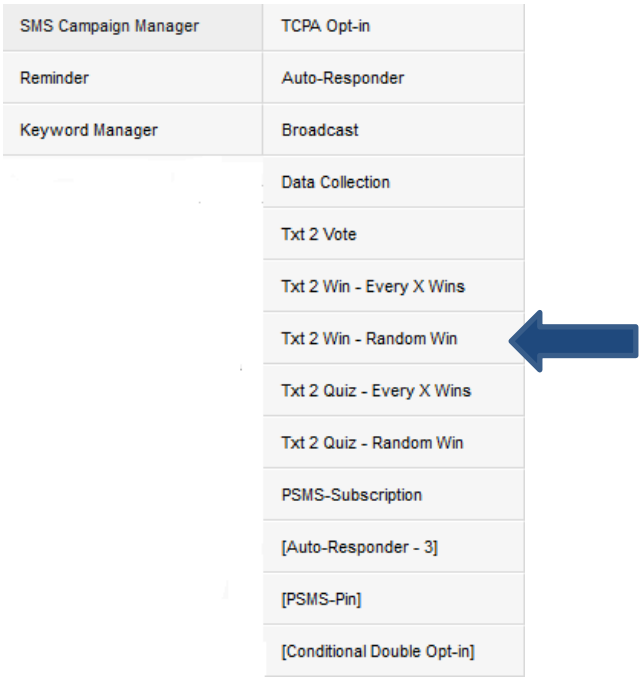
1. For **Recurrence Time**, you may leave the default setting, **Same as First Occurrence Launch Time**.
2. Otherwise check the second radio button and enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
3. Choose a **Time Zone**.
4. If you would like a **Recurrence Duration** different from the default (***1 Day***), select it from the drop-down list.
5. The default **Recurrence Pattern** is ***Daily/Recur every 1 day***. If you like, simply choose the options which match your preferences.
6. You may also specify the **Range of recurrence**. This can either end after a specific number of occurrences, or you can specify a date and time on which the distributions will end.

You may click the **Previous** button to return to prior steps. If you're happy with all of the of the settings, click **Launch SMS Campaign** to commit your changes and return to the main page.

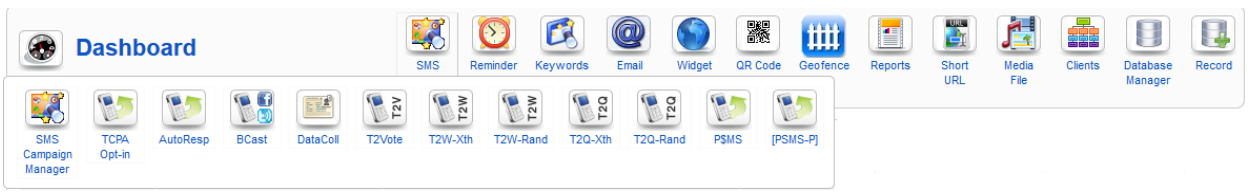
Txt 2 Win - Random Win

The **Txt 2 Win -Random Win** feature is a tool for creating simple campaigns that solicit SMS responses to participate in a game in which the winning entries are chosen at random by the system. Also, you may specify the frequency of winning entries, the maximum number of winners, and several other options. It is easy to setup by following the instructions in this section.

You may access this feature by choosing **SMS Campaign > SMS Campaign Manager > Txt 2 Win Random Win** from the toolbar.



Don't forget that you can access the SMS Campaigns by utilizing the quick link icons that are located under the toolbar on the Dashboard.



After choosing this menu item, you will see a page much like the figure below.

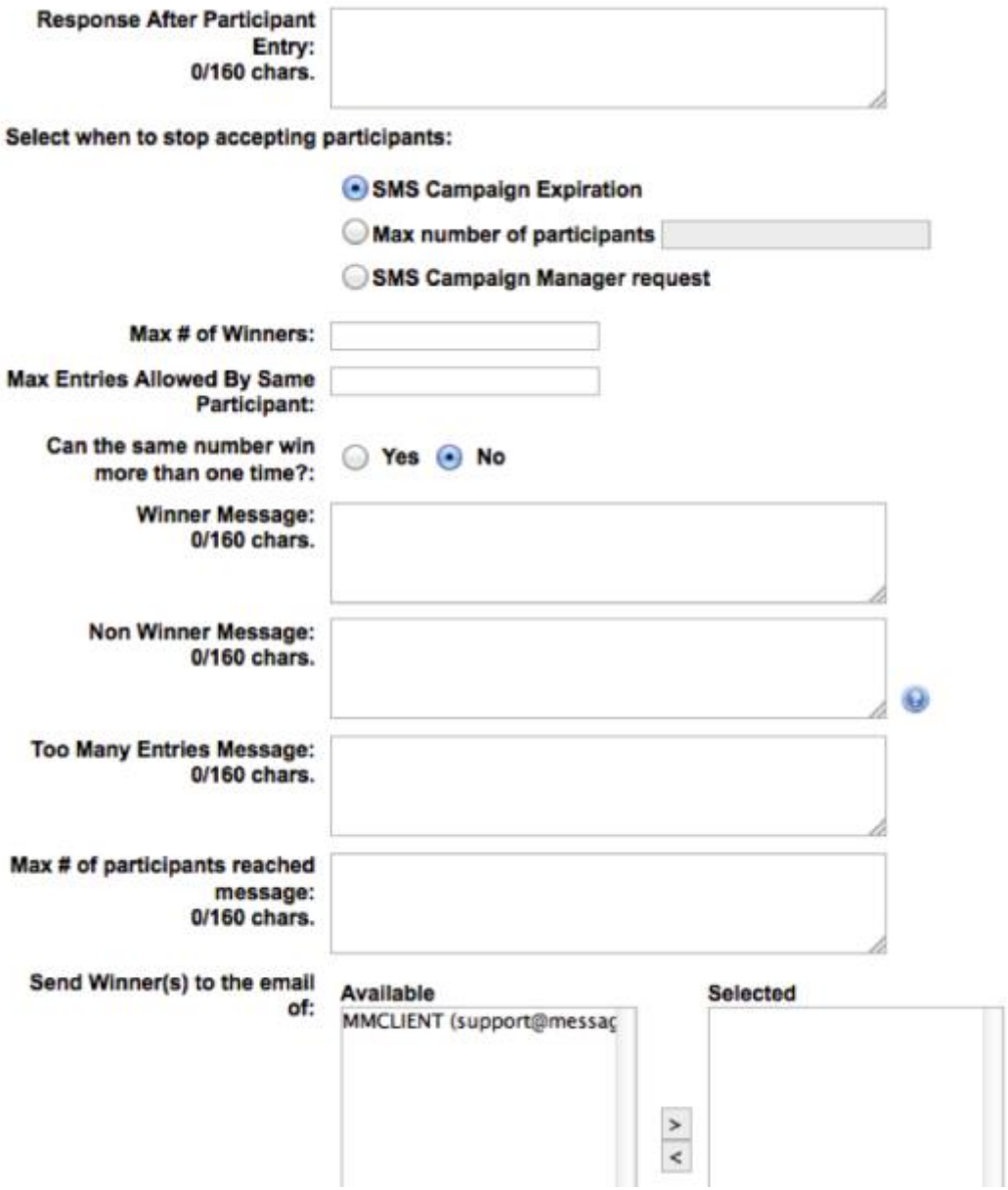
Profile Summary

To begin, follow these steps:

1. Click the **Client** drop-down list, and then select the correct client name.
2. Also, choose a **Keyword** from the drop-down list (if any are available).
3. Enter a **SMS Campaign Name**.
4. Optionally, enter the **SMS Campaign Notes**.
5. When you're happy with the entries, click the **Next** button to continue on to the next step, **Message**.

Message

In this step, you'll specify the frequency of winning entries, the maximum number of winners, and configure a number of options. Think of it as a conversation template: here you are configuring the interaction between the SMS recipient and your campaign. Remember, the maximum length of the message (and error message) is 160 characters.



Have a look at the figure, and then read below to learn the steps:

1. Begin by entering the **Response After Participant Entry**. This is the response message that will be sent to each participant when their entry message is received by the system.
2. Next, make a choice for **Select when to stop accepting participants**. The default setting is at the **SMS Campaign Expiration**, which is the date on which the campaign ends (see the Launch & Expiration section below). You can also stop accepting participants upon reaching the **Max number of participants** , or at any time upon the **SMS Campaign Manager request**.
3. Place a limit on the number of winners by entering a value in the **Max # of Winners** field.

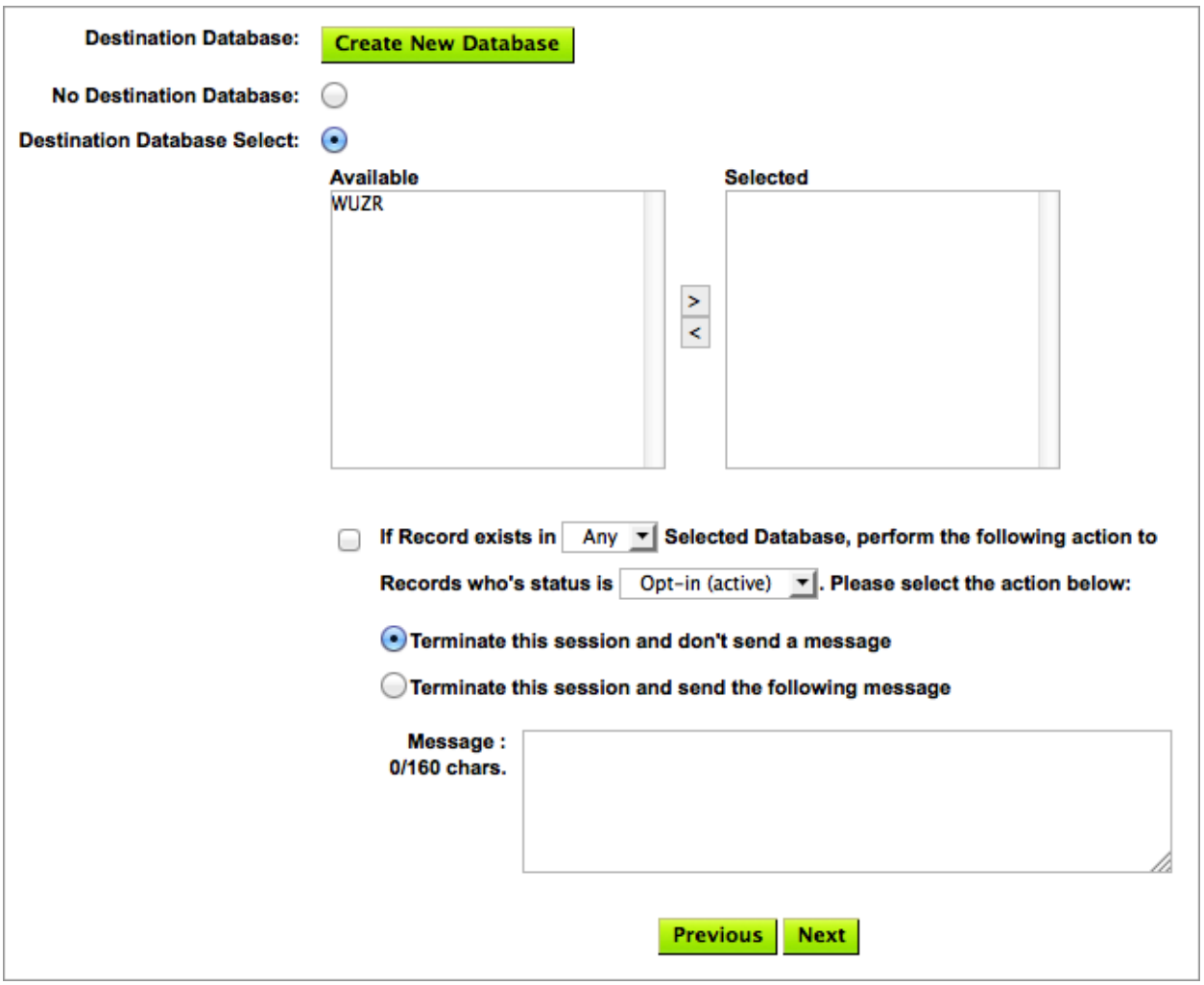
4. Limit the number of entries per SMS number by entering a value in the **Max Entries Allowed By Same Participant** field. For example, if you specify the value as "1", then only one entry per number is acceptable. If a participant exceeds this maximum, they will receive the message you write in the **Too Many Entries Message** field (see below).
5. If you want to permit the possibility of multiple wins for a single participant, choose **Yes** for **Can the same number win more than one time?**
6. Every winning participant will receive the message you write into **Winner Message**. All others will receive the message you place into the **Non-Winner Message** field.
7. In the field **Too Many Entries Message**, enter the message that will be sent to those participants who attempt to exceed the **Max Entries Allowed by the Same Participant** (see above).
8. The contest is over when the **Max # of Winners** has been reached (see above). In the **Max # of Winners reached message** field, enter the message that will be sent to anyone who attempts to participate in the game after the contest is over.
9. Finally, you'll need to select the email address to which the winning numbers will be sent. For **Send Winner(s) to the email of**, select the email address from the **Available** listing by clicking the small arrow.
10. Click **Next** to move on to the **Destination Database** step.

Destination Database

In this step, you'll choose the database in which you want to store your campaign data. If no database exists, you may create one by following these steps:

1. Click **Create New Database**.
2. Enter a **Database Name**.
3. Check the box for **Send Subscription Renewal Msg?** if you want to send a monthly renewal message to your database.
4. Click **Submit** to commit your changes; click **Cancel** to discard.

If at least one database already exists, you'll see it in the **Available** listing (see the figure below). Follow the steps below to manage your databases.



To choose one or more existing databases:

1. Click the database name in the **Available** listing, and then click the right arrow to move the database name to the **Selected** listing.
2. If you want to take action when a duplicate entry is found in a database, check the **If Record exists** box.
3. In the first drop-down, choose ***All*** if you want to this setting to apply only if a duplicate is found in all databases in the **Selected** listing. Leave the default (***Any***) if you want this setting if at least one duplicate is found in any of the databases.
4. In the second drop down, the default option is ***Opt-in (Active)***. If you leave this option, the setting will only apply to duplicate records having an opt-in value. Instead, you might choose **Opted-out (Inactive)** or ***Any***.

5. Next, decide what happens when a duplicate is found. You can choose to **Terminate** this session and don't send a message, or choose to send a message. If you choose the second option, then enter the **Message**.
6. When you're happy with your changes, click **Next** to continue to the last step.

Launch & Expiration

This is the last step, in which you'll define the duration of the campaign by specifying the launch and expiration dates. The default settings are such that the campaign will begin immediately and have no expiration date. Follow these simple steps if you want to modify either, or both:

Configure a Launch Date

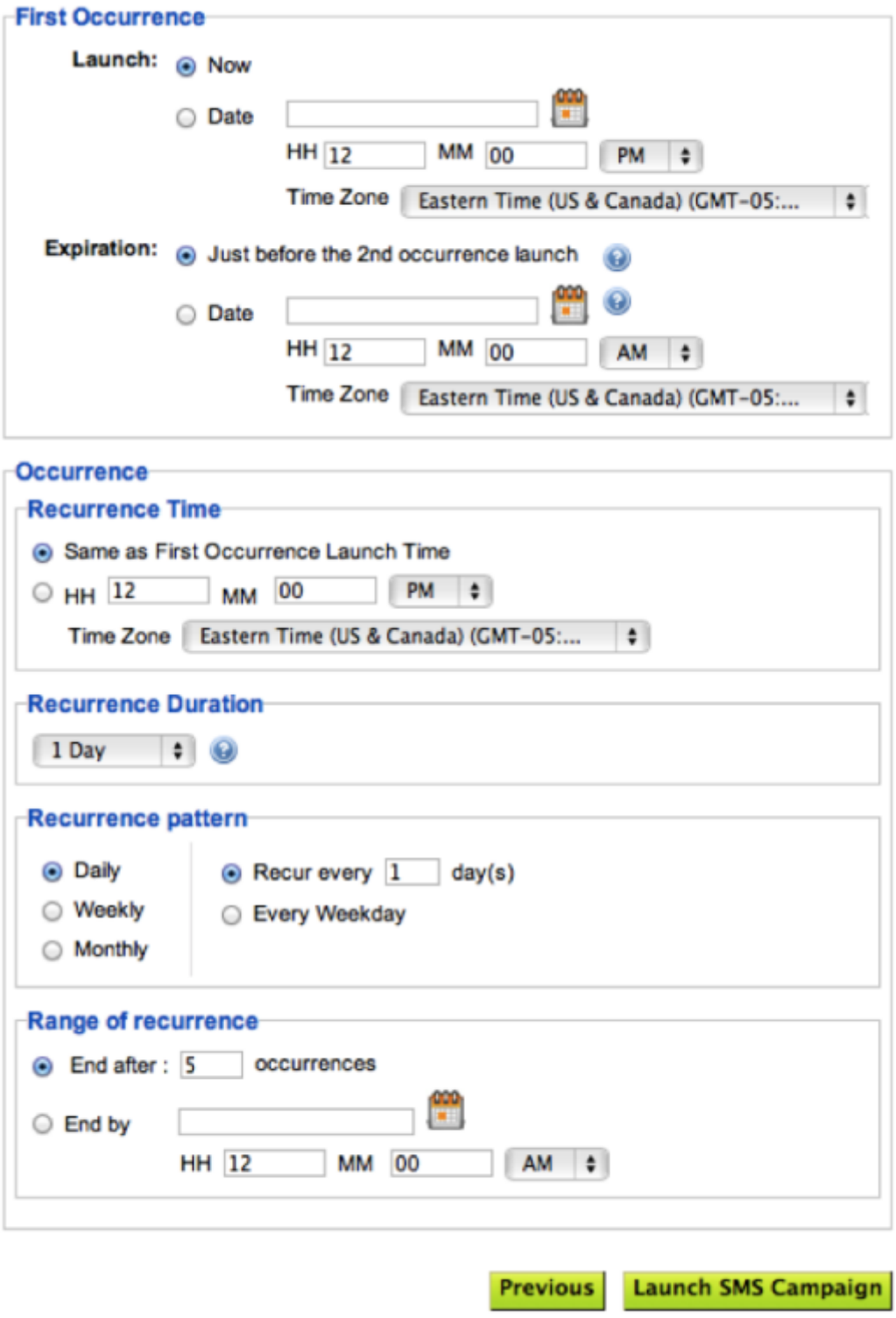
1. If you want to specify a launch date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will begin.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Configure an Expiration Date

1. If you want to specify an expiration date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will expire.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Recurrence

You may also launch, stop, and launch the broadcast repeatedly. Follow the steps below to configure multiple launches:


First Occurrence
Launch:
Now
Date
HH 12 MM 00 PM
Time Zone Eastern Time (US & Canada) (GMT-05:...
Expiration:
Just before the 2nd occurrence launch
Date
HH 12 MM 00 AM
Time Zone Eastern Time (US & Canada) (GMT-05:...
Occurrence
Recurrence Time
Same as First Occurrence Launch Time
HH 12 MM 00 PM
Time Zone Eastern Time (US & Canada) (GMT-05:...
Recurrence Duration
1 Day
Recurrence pattern
Daily
Weekly
Monthly
Recur every 1 day(s)
Every Weekday
Range of recurrence
End after : 5 occurrences
End by
HH 12 MM 00 AM
Previous
Launch SMS Campaign

Configure a Launch Date for the First Occurrence

1. If you want to specify a launch date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will begin.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Configure an Expiration Date for the First Occurrence

1. If you want to specify an expiration date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will expire.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Occurrence

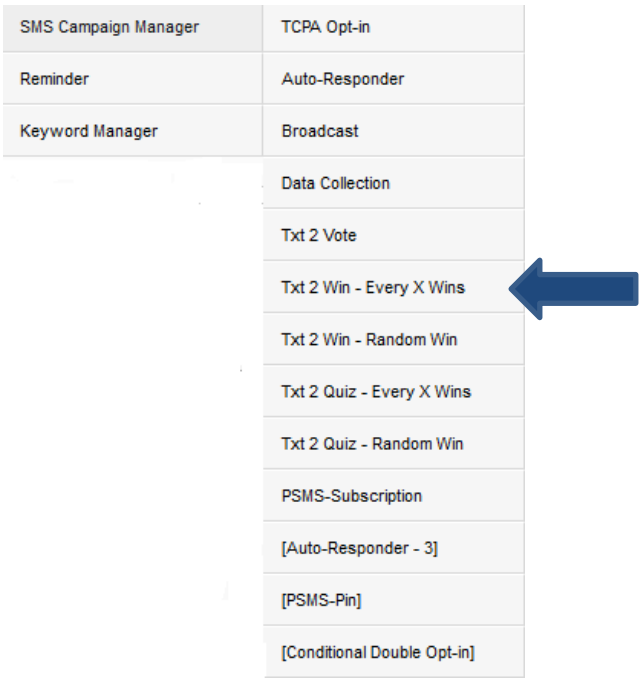
1. For **Recurrence Time**, you may leave the default setting, **Same as First Occurrence Launch Time**.
2. Otherwise check the second radio button and enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
3. Choose a **Time Zone**.
4. If you would like a **Recurrence Duration** different from the default (***1 Day***), select it from the drop-down list.
5. The default **Recurrence Pattern** is ***Daily/Recur every 1 day***. If you like, simply choose the options which match your preferences.
6. You may also specify the **Range of recurrence**. This can either end after a specific number of occurrences, or you can specify a date and time on which the distributions will end.

You may click the **Previous** button to return to prior steps. If you're happy with all of the of the settings, click **Launch SMS Campaign** to commit your changes and return to the main page.

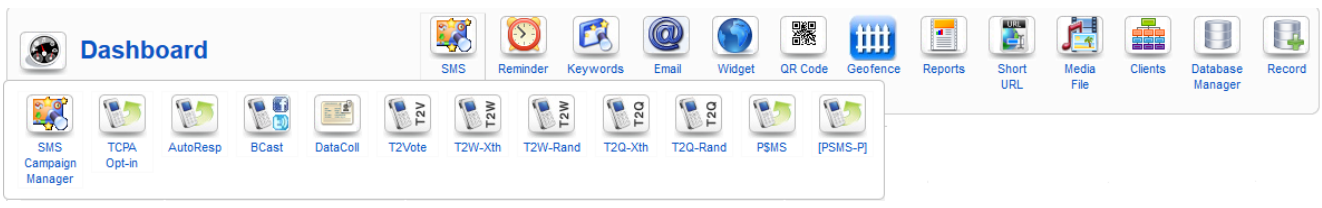
Txt 2 Win - Every X Wins

The **Txt 2 Win** feature is a tool for creating simple campaigns that solicit SMS responses to participate in a game in which winning entries occur at regular intervals. Also, you may specify the frequency of winning entries, the maximum number of winners, and several other options. It is easy to setup by following the instructions in this section.

You may access this feature by choosing **SMS Campaign > SMS Campaign Manager > Txt 2 Win - Every X Wins** from the toolbar.



Don't forget that you can access the SMS Campaigns by utilizing the quick link icons that are located under the toolbar on the Dashboard.



After choosing this menu item, you will see a page much like the figure below.

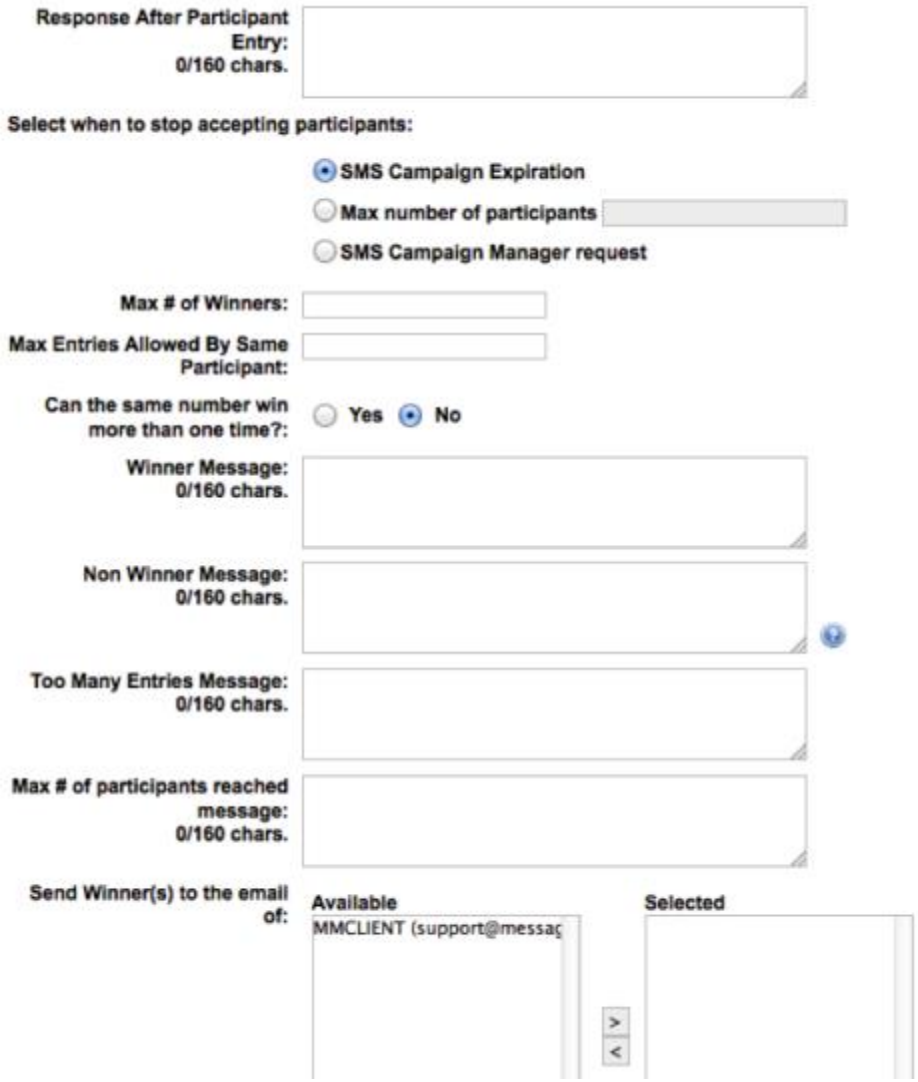
Profile Summary

To begin, follow these steps:

1. Click the **Client** drop-down list, and then select the correct client name.
2. Also, choose a **Keyword** from the drop-down list (if any are available).
3. Enter a **SMS Campaign Name**.
4. Optionally, enter the **SMS Campaign Notes**.
5. When you're happy with the entries, click the **Next** button to continue on to the next step, **Message**.

Message

In this step, you'll specify the frequency of winning entries, the maximum number of winners, and configure a number of options. Think of it as a conversation template: here you are configuring the interaction between the SMS recipient and your campaign. Remember, the maximum length of the message (and error message) is 160 characters.



Have a look at the figure, and then read below to learn the steps:

1. Begin by entering the **Every X Wins**. This is the win frequency. If, for example, you enter "50", then 1 out of every 50 replies will be a winner.
2. Place a limit on the number of winners by entering a value in the **Max # of Winners** field.
3. Limit the number of entries per SMS number by entering a value in the **Max Entries Allowed By Same Participant** field. For example, if you specify the value as "1", then only one entry per number is acceptable. If a participant exceeds this maximum, they will receive the message you write in the **Too Many Entries Message** field (see below).
4. Every winning participant will receive the message you write into **Winner Message**. All others will receive the message you place into the **Non-Winner Message** field.
5. In the field **Too Many Entries Message**, enter the message that will be sent to those participants who attempt to exceed the **Max Entries Allowed by the Same Participant** (see above).

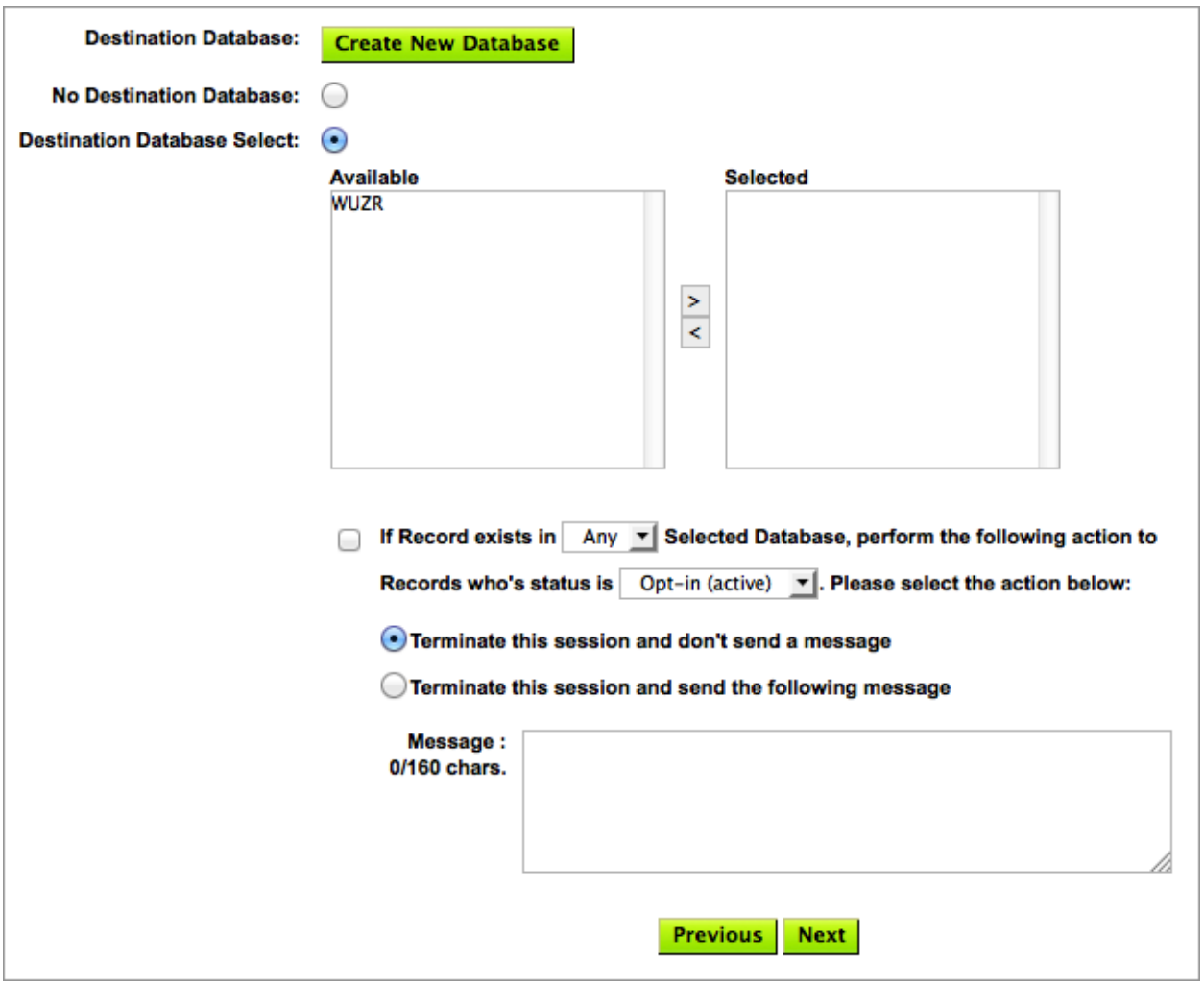
6. The contest is over when the **Max # of Winners** has been reached (see above). In the **Max # of Winners reached message** field, enter the message that will be sent to anyone who attempts to participate in the game after the contest is over.
7. Finally, you'll need to select the email address to which the winning numbers will be sent. For **Send Winner(s) to the email of**, select the email address from the **Available** listing by clicking the small arrow.
8. Click **Next** to move on to the **Destination Database** step.

Destination Database

In this step, you'll choose the database in which you want to store your campaign data. If no database exists, you may create one by following these steps:

1. Click **Create New Database**.
2. Enter a **Database Name**.
3. Check the box for **Send Subscription Renewal Msg?** if you want to send a monthly renewal message to your database.
4. Click **Submit** to commit your changes; click **Cancel** to discard.

If at least one database already exists, you'll see it in the **Available** listing (see the figure below). Follow the steps below to manage your databases.



To choose one or more existing databases:

1. Click the database name in the **Available** listing, then click the right arrow to move the database name to the **Selected** listing.
2. If you want to take action when a duplicate entry is found in a database, check the **If Record exists** box.
3. In the first drop-down, choose ***All*** if you want to this setting to apply only if a duplicate is found in all databases in the **Selected** listing. Leave the default (***Any***) if you want this setting if at least one duplicate is found in any of the databases.
4. In the second drop down, the default option is ***Opt-in (Active)***. If you leave this option, the setting will only apply to duplicate records having an opt-in value. Instead, you might choose **Opted-out (Inactive)** or ***Any***.

5. Next, decide what happens when a duplicate is found. You can choose to **Terminate** this session and don't send a message, or choose to send a message. If you choose the second option, then enter the **Message**.
6. When you're happy with your changes, click **Next** to continue to the last step.

Launch & Expiration

This is the last step, in which you'll define the duration of the campaign by specifying the launch and expiration dates. The default settings are such that the campaign will begin immediately and have no expiration date. Follow these simple steps if you want to modify either, or both:

Configure a Launch Date

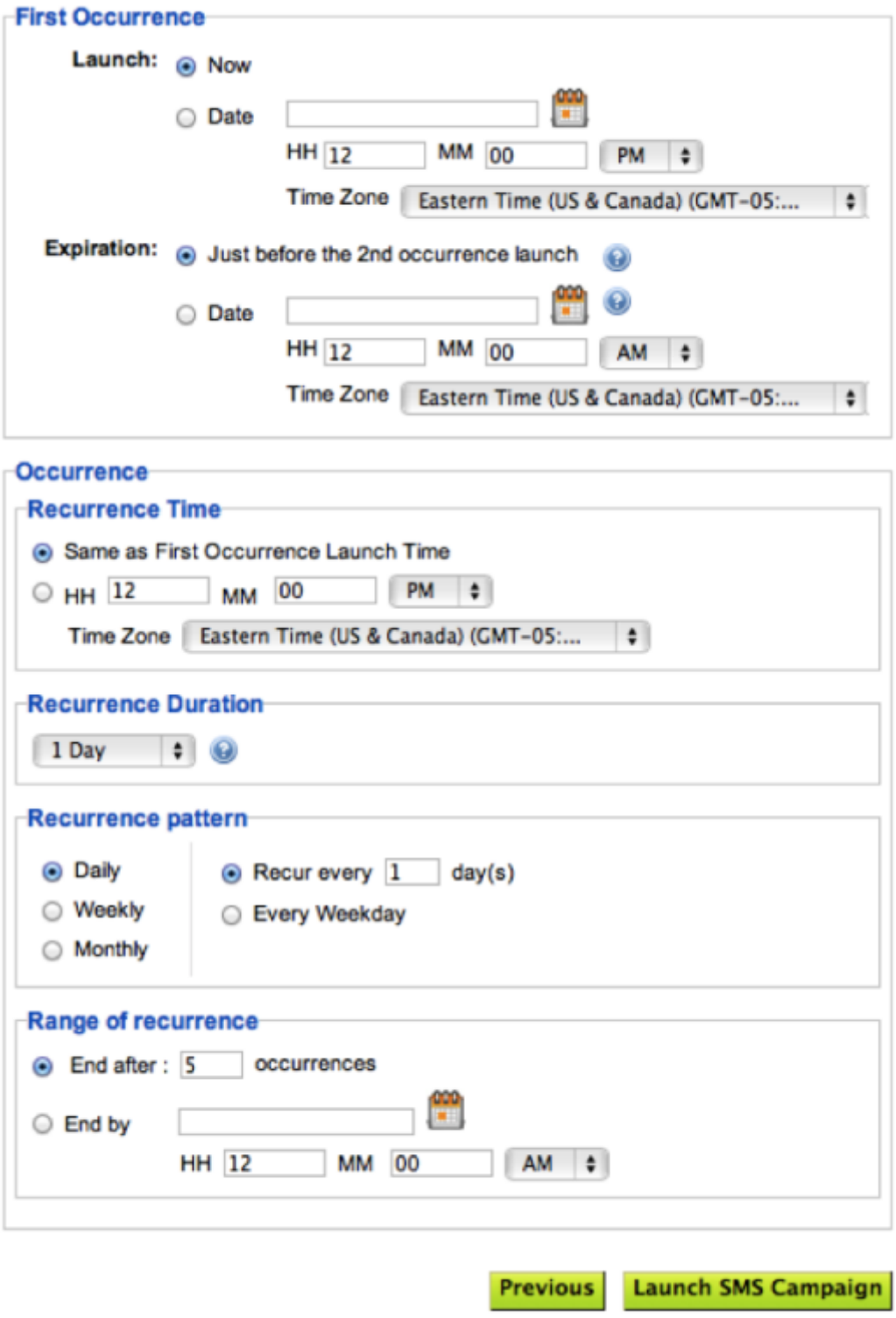
1. If you want to specify a launch date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will begin.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Configure an Expiration Date

1. If you want to specify an expiration date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will expire.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Recurrence

You may also launch, stop, and launch the broadcast repeatedly. Follow the steps below to configure multiple launches:


First Occurrence
Launch:
Now
Date
HH 12
MM 00
PM
Time Zone
Eastern Time (US & Canada) (GMT-05:...
Expiration:
Just before the 2nd occurrence launch
Date
HH 12
MM 00
AM
Time Zone
Eastern Time (US & Canada) (GMT-05:...
Occurrence
Recurrence Time
Same as First Occurrence Launch Time
HH 12
MM 00
PM
Time Zone
Eastern Time (US & Canada) (GMT-05:...
Recurrence Duration
1 Day
Recurrence pattern
Daily
Weekly
Monthly
Recur every 1 day(s)
Every Weekday
Range of recurrence
End after : 5 occurrences
End by
HH 12
MM 00
AM
Previous
Launch SMS Campaign

Configure a Launch Date for the First Occurrence

1. If you want to specify a launch date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will begin.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Configure an Expiration Date for the First Occurrence

1. If you want to specify an expiration date, click the **Date** radio button.
2. Click the calendar icon to select a date on which the campaign will expire.
3. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
4. Choose a **Time Zone**.

Occurrence

1. For **Recurrence Time**, you may leave the default setting, **Same as First Occurrence Launch Time**.
2. Otherwise check the second radio button and enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
3. Choose a **Time Zone**.
4. If you would like a **Recurrence Duration** different from the default (***1 Day***), select it from the drop-down list.
5. The default **Recurrence Pattern** is ***Daily/Recur every 1 day***. If you like, simply choose the options which match your preferences.
6. You may also specify the **Range of recurrence**. This can either end after a specific number of occurrences, or you can specify a date and time on which the distributions will end.

You may click the **Previous** button to return to prior steps. If you're happy with all of the of the settings, click **Launch SMS Campaign** to commit your changes and return to the main page.

Keywords

Keywords are simple unique, identifying words that through text messages make your text message campaign as effective as possible. When someone texts your keyword, it triggers your campaign that you created to launch on the users device. Often, a simple keyword is the most effective as it is easy to remember and text. In the topics below we explain how to create and manage keywords.

- Keyword Manager
- Create a New Keyword

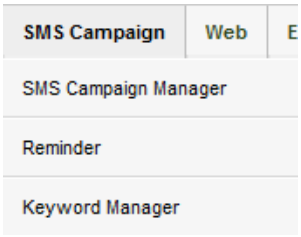
You may access these tools from the **SMS Campaign** menu in the **Textboom** toolbar or from the quick link

icon on the Dashboard.

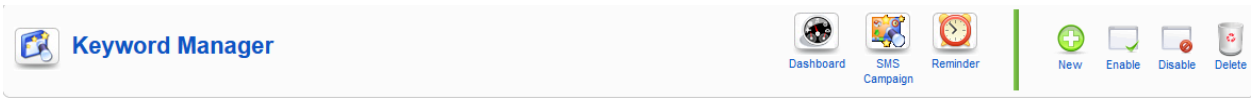
Keyword Manager

The **Keyword Manager** displays a listing of all keyword records for your account. You can filter by **OC (Operating Company)**, **Agency**, **Client**, **Status**, or **Short Code**. You can edit, disable, re-enable, and delete campaigns. You may also perform a search for a specific word or number. The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time.

You may access this feature by choosing **SMS Campaign > Keyword Manager** from the toolbar.



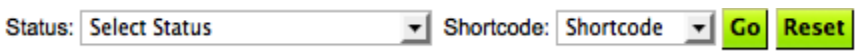
After choosing this menu item, you'll see a page having the characteristics which we describe below.



Filters

On the left side of the report control panel, you'll find a group of filters (below). Choose from one or more of these drop-down menus to filter by **OC (Operating Company)**, **Agency**, **Client**, **Status**, or **Short Code**.

Along with these filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.



Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Add, Enable, Disable, or Delete Keywords

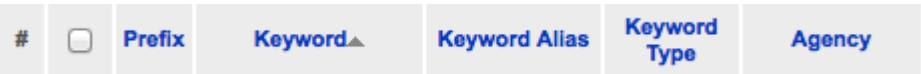
In the upper right corner of the page, locate these icons:

Check the box next to any record, and then click the icon that corresponds to the function you want to apply:

- **New** - add a new keyword.
- **Enable** - enables a record that has been previously been disabled.
- **Disable** - Click this icon to disable the keyword. A disabled keyword cannot be used again until it is enabled.
- **Delete** - click this icon to delete a keyword. A deleted keyword is both disabled and invisible.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see a list of all your keyword listings.



Managing Keywords

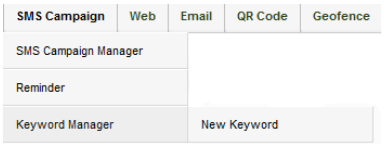
At the extreme right end of each record in the listing you'll find a series of small icons:

Click this icon to edit the keyword (you will exit the Keyword Manager).
Click this icon to enable the keyword.
Click this icon to disable the keyword. A disabled keyword cannot be used again until it is enabled.
Click this icon to delete a keyword. A deleted campaign is both disabled and invisible.

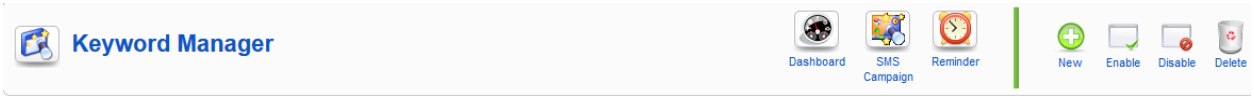
Create a New Keyword

With the **Keyword** feature, you may create a new keyword for use with your campaigns. You can create a simple keyword, or a progressive keyword that has a prefix that you might use with other keywords. Read below to see how easy it is to setup.

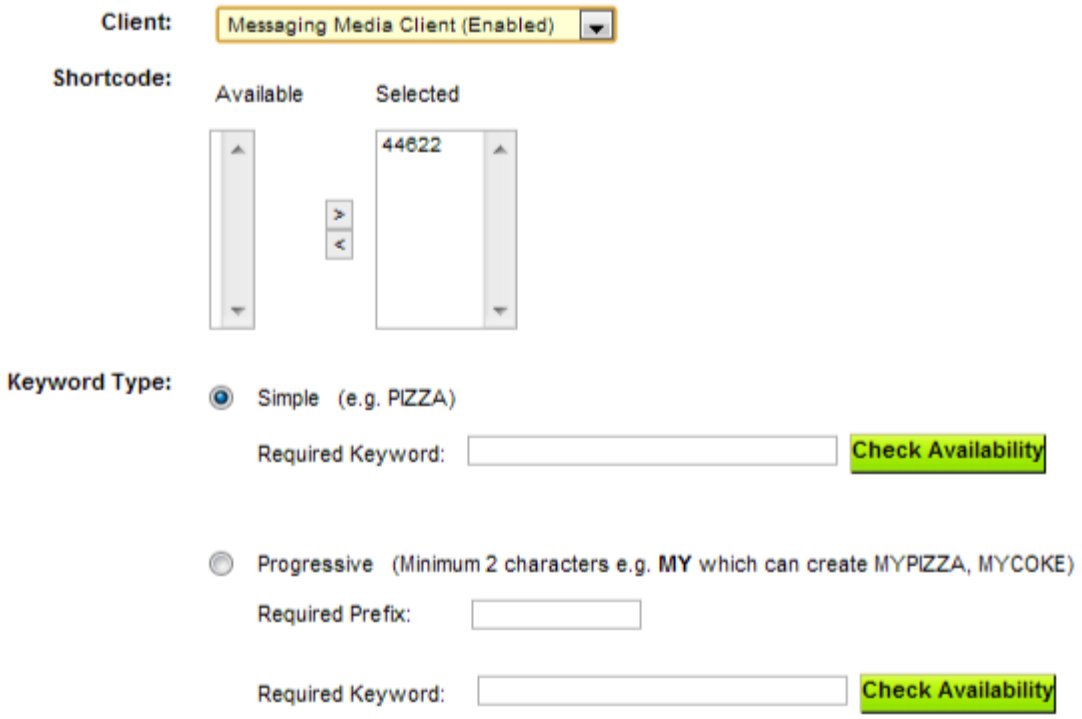
You may access this feature by choosing **SMS Campaign > Keyword Manager > New Keyword** from the toolbar.



Or by clicking on **New** from the Keyword Manager.



After choosing this menu item, you will see a page much like the figure below.



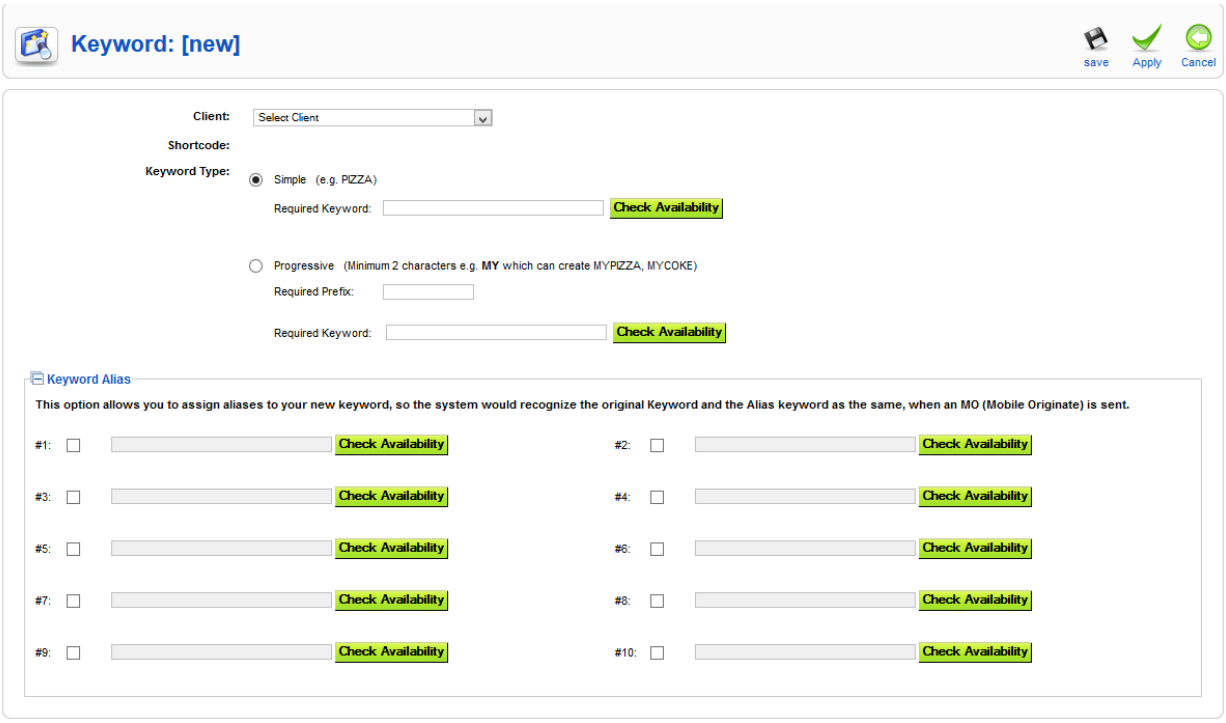
Follow these steps to create a keyword:

1. Click the **Client** drop-down list, then select the correct client name.
2. Enter a **Name** for the keyword.
3. To choose a **Shortcode**, click the database name in the **Available** listing, then click the right arrow to move the database name to the **Selected** listing.
4. Next, decide if you want a **Simple** or **Progressive** type of keyword (**Keyword Type**).
5. If you want a **Simple** keyword, type the keyword into the field for **Required Keyword** and then click the **Check Availability** button. You'll receive a confirmation message if the keyword is available or an error message if it is not.
6. If you want a **Progressive** keyword, first type the prefix word into the field for **Required Prefix**. This will prepend the prefix to the **Required Keyword** field. Next, enter the keyword into the field for **Required Keyword**. Then click the **Check Availability** button. You'll receive a confirmation message if the keyword is available or an error message if it is not.
7. When you're happy with the entries, click the **Save** button in the upper right corner of the page. Click **Cancel** to discard your entries.

Keyword Alias

Optionally, you can specify one or more aliases that will serve as substitute for the keyword in campaigns where it is put into use. An example may be Follow these steps to create a keyword alias:

1. At the bottom of the page, click the plus (+) sign for **Keyword Alias** to expand that section.
2. Check the box for **#1**, then enter the alias keyword and click **Check Availability**. You'll receive a confirmation message if the keyword is available or an error message if it is not.
3. If you want to enter more aliases, check the boxes and enter keywords for **#2, #3**, and so on.
4. When you're happy with the entries, click the **Save** button in the upper right corner of the page. Click **Cancel** to discard your entries.



Reminders

In this chapter, we explain how to use these tools:

- Database Reminder
- Birthday Reminder
- Reminder Manager

You may access these tools from the **SMS Campaign** menu in the **Textboom** toolbar or from the quick link

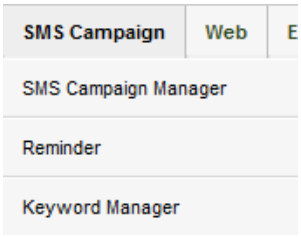
icon on the Dashboard.

Reminder Manager

The **Reminder Manager** displays a listing of all reminders for your account. You can filter by **Client**, **Status**, or **Type**. You can edit, disable, re-enable, and delete reminders.

There are also options to restrict the date range and perform a search for a specific word or number. The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time.

You may access this feature by choosing **SMS Campaign > Reminder** from the toolbar.

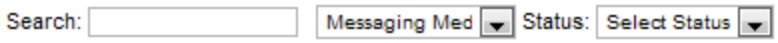


Don't forget that you can access the SMS Campaigns and features by utilizing the quick link icons that are located under the toolbar on the Dashboard.

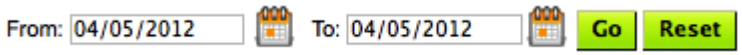
After choosing this menu item, you'll see a page having the characteristics which we describe below.

Filters

On the left side of the report control panel, you'll find a group of filters (below). Choose from one or more of these drop-down menus to filter by **Client**, **Status**, or **Type**.



Along with these filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.



Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Restrict by Date Range

On the right side of the report control panel, you may find the **From** and **To** of date filters (see the figure above). Follow these steps to limit the records in the listing to only those that fall within a date range:

1. Click the **From** calendar icon (for example, enter 4/1/2012).
2. Next, click the **To** calendar icon (you might enter 4/30/2012).
3. Click the **Go** button to update the listing. Only the records that fall within the date range will appear in the results.
4. Click the **Reset** button to revert back to the original filter settings.

Enable, Disable, or Delete Reminders

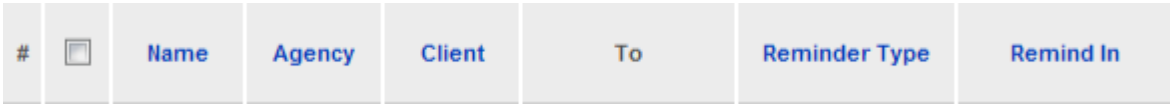
In the upper right corner of the page, you may find three icons:

Check the box next to any record, and then click the icon that corresponds to the function you want to apply:

- **Enable** - enables a record that has been previously been disabled.
- **Disable** - Click this icon to disable the campaign. A disabled reminder cannot be used again until it is enabled.
- **Delete** - click this icon to delete a reminder. A deleted reminder is both disabled and invisible.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see a list of all your reminders.



Managing Campaigns

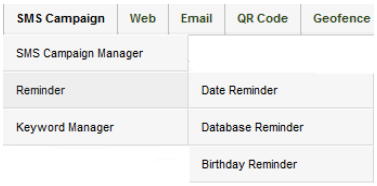
At the extreme right end of each record in the listing you'll find a series of small icons:

- Click this icon to edit the reminder (you will exit the Reminder Manager).
- Click this icon to enable the reminder.
- Click this icon to disable the reminder. A disabled reminder cannot be used again until it is enabled.
- Click this icon to delete a reminder. A deleted reminder is both disabled and invisible.

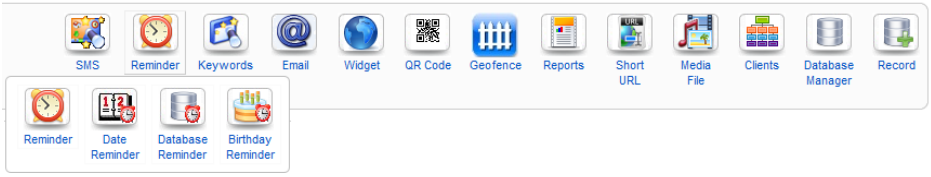
Date Reminder

The **Date Reminder** feature allows a user to send a text message on a specific date that matches a date value found in a database record. This date can be in any date field in the entire record. Optionally, you can send the message at a custom interval that is either before or after the date.

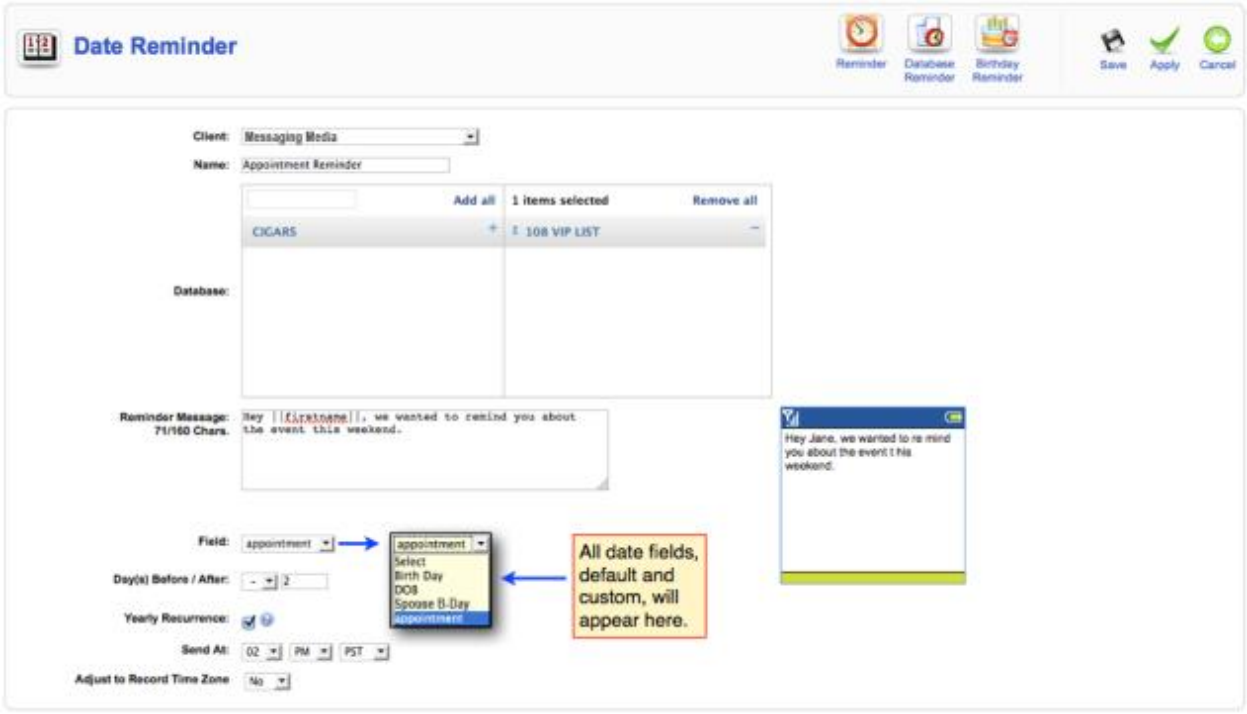
Access this feature by choosing **SMS Campaign > Reminder > Date Reminder** from the toolbar.



Don't forget that you can access the SMS Campaigns and features by utilizing the quick link icons that are located under the toolbar on the Dashboard.



After choosing this menu item, you will see a page much like the figure below.



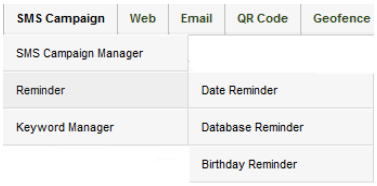
Follow these steps to create a reminder:

1. Click the **Client** drop-down list.
2. Enter a **Name** for the reminder.
3. Choose one or more databases from the **Database** listing. Click the plus sign (**+**) to move the database name to the **Selected** listing.
4. Enter the **Reminder Message**.
5. Choose the **Field** in which you want to look for matching dates.
6. For **Day(s) Before / After**, enter the number of day(s) before-or after-the message is to be sent. If you want to send the message *prior* to the matching date (found in the **Field** column), then select the minus sign (-). To send a message *after* the date occurs, use the plus sign (+).
6. By default, the message will be sent once annually-which is especially effective for anniversary dates. Remove the check from **Yearly Recurrence** if you do not want the message to be sent every year.
7. Choose the **Send At** time. This is the precise hour of the day at which the message will be sent.
8. If you want to conform to the time zone that is found in the database record, then choose ***Yes*** in the dropdown for **Adjust to Record Time Zone**.
9. When you're happy with the entries, click the **Save** button in the upper right corner of the page. Click **Cancel** to discard your entries.

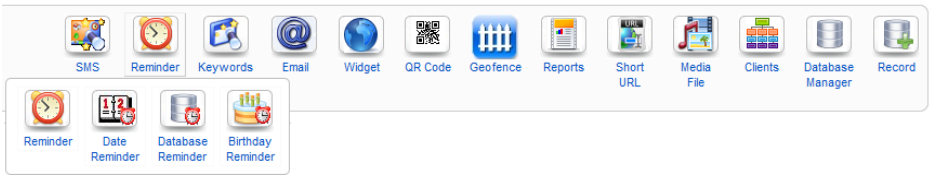
Database Reminder

The **Database Reminder** feature is a tool for distributing simple SMS reminder messages. Read below to see how easy it is to setup.

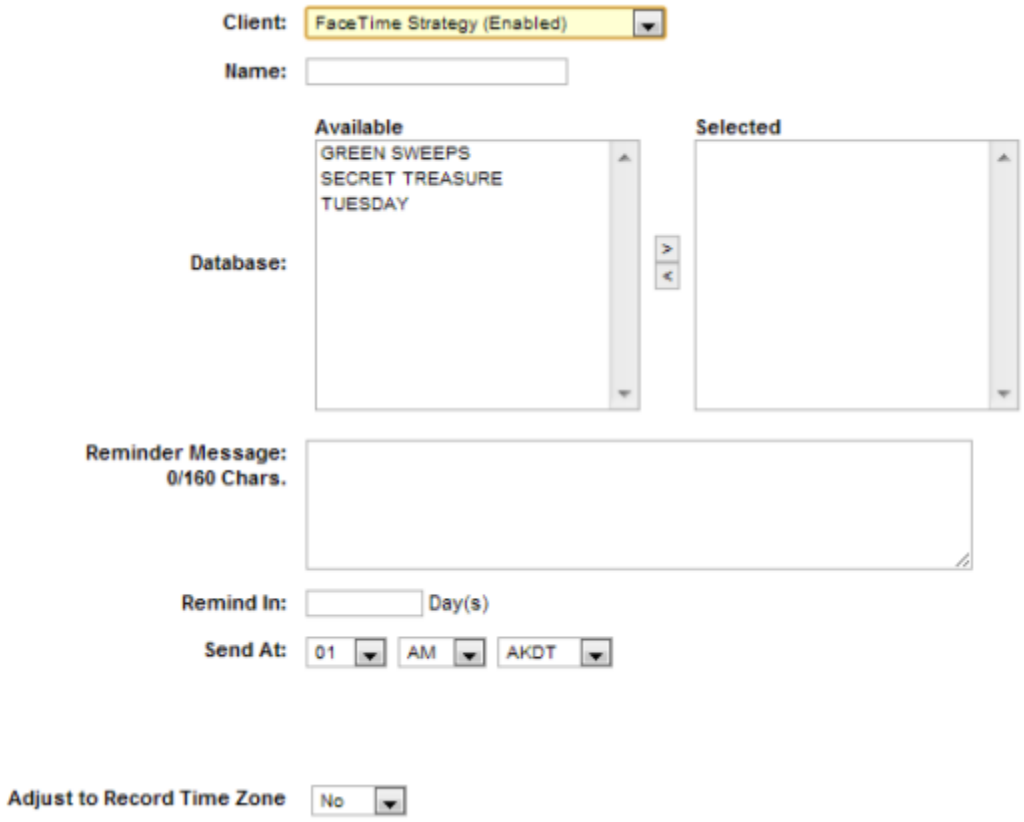
You may access this feature by choosing **SMS Campaign > Reminder > Database Reminder** from the toolbar.



Don’t forget that you can access the SMS Campaigns and features by utilizing the quick link icons that are located under the toolbar on the Dashboard.



After choosing this menu item, you will see a page much like the figure below.



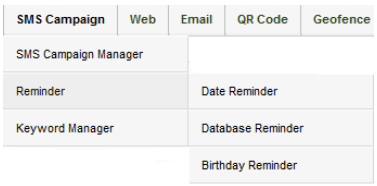
Follow these steps to create a reminder:

1. Click the **Client** drop-down list, then select the correct client name.
2. Enter a **Name** for the Reminder.
3. To choose a **Database**, click the database name in the **Available** listing, then click the right arrow to move the database name to the **Selected** listing.
4. Enter the **Reminder Message**.
5. In the **Reminder In** field, enter the number of days that will elapse until the reminder message will be sent.
6. Optionally, for **Send At**, choose the precise time at which you want the reminder to be sent. Choose ***No*** for **Adjust Record to Time Zone** if you don't want the reminder to account for the time zone in the recipient's record.
7. When you're happy with the entries, click the **Save** button in the upper right corner of the page. Click **Cancel** to discard your entries.

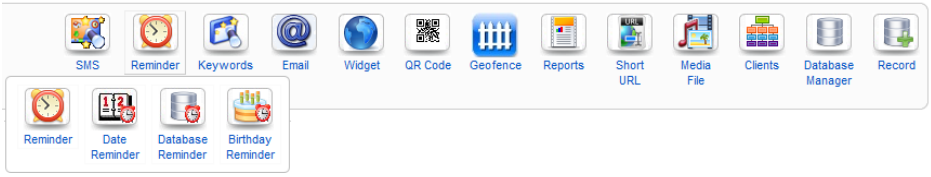
Birthday Reminder

The **Birthday Reminder** feature is a tool for distributing SMS birthday reminder messages. Unlike the Database Reminder, this reminder examines the **Date of Birth** birthday field in the recipient's record. Read below to see how easy it is to setup.

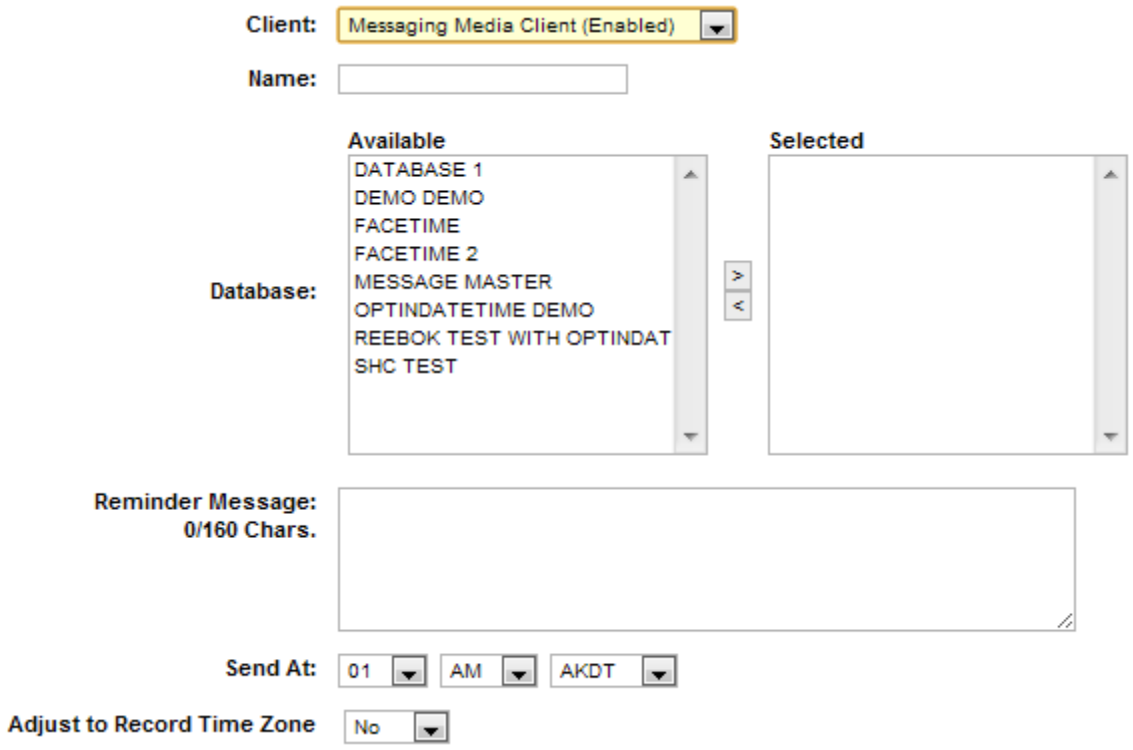
You may access this feature by choosing **SMS Campaign > Reminder > Birthday Reminder** from the toolbar.



Don't forget that you can access the SMS Campaigns and features by utilizing the quick link icons that are located under the toolbar on the Dashboard.



After choosing this menu item, you will see a page much like the figure below.



Follow these steps to create a reminder:

1. Click the **Client** drop-down list, and then select the correct client name.
2. Enter a **Name** for the reminder.
3. To choose a **Database**, click the database name in the **Available** listing, then click the right arrow to move the database name to the **Selected** listing.
4. Enter the **Reminder Message**.
5. Optionally, for **Send At**, choose the precise time at which you want the reminder to be sent. Choose ***No*** for **Adjust Record to Time Zone** if you don't want the reminder to account for the time zone in the recipient's record.
6. When you're happy with the entries, click the **Save** button in the upper right corner of the page. Click **Cancel** to discard your entries.

Message Tags

What is a Personalized Text Message?
A personalized text message-also known as a tagged message-allows you to define a text message that can combine text that you type with tags that function as placeholders for information stored in the member record in the database or in another data source. **Textboom** will automatically replace each tag with the particular data value for each member. You can use tags in any text message field.

Note: The tags are only optional. There is no requirement whatsoever to use any tag when creating a text message.

How to construct a message with tags?

The text message that you want to send may be a combination of static text, data that is dynamically taken from the database or specialty values that are generated just before the message is sent. When you write a message, you enter the text that you want and insert tags precisely where you want to use personalized information. To separate tags from the text we use this notation: ||fieldname, parameter||. The items found between each "||" will be replaced by data that Textboom fetches the actual information and formatting it properly. The "||" will NOT be part of the message that is sent.

Notes

• The double "||" sign is made of two "|" (pipe) characters.

• Remember that the maximum length of the message to be sent is 160 characters. In checking the length, Textboom will also take into account the length of the tags.

• Fields value may be empty, so when you design the message please be aware that there is nothing to fill the tag. E.g. if your message include: "Dear ||firstname|| ||lastname|| …" and the first name field is empty the message might show as: "Dear Smith …."

• We highly recommend that you use tags with the **max length** parameter defined, so that you guarantee the final message will be fewer than 160 characters. For example, use ||firstname, 7|| instead of ||firstname|| to ensure that only the first 7 characters of the first name will be included.

• For some fields, you can also select the format for presenting the data. This is especially important for date fields. For example, use ||created, D1|| to display the date as mm-dd-yyyy (10 characters), or ||created, d3|| to display the date as yy-mm-dd (8 characters, with the year shown first).

Supported Database Field Tags

When crafting a message, you can use the data that the system stores in its database about members. The system has predefined fields that you can populate, as well as custom fields that you can define for your specific needs.

The rule is very simple: the name of the field is also the name of the tag. For example, the field *City* can be used as the tag ||city||, or if you define a custom field *Tutor*, the tag is ||tutor||.

Now, since fields hold different type of information at different lengths, and text messages are limited in length, the system allows you to control the format (the presentation of the data) and restrict the length of the data.

List of predefined fields that you can use as tags

Field	Tag	Type	Description
Cellphone	||cellphone||	(N)	Cell phone number
Carrier	||carrier||	(A)	Mobile Carrier serving this cell phone
Firstname	||firstname||	(A)	First name (can be empty)
Lastname	||lastname||	(A)	Last name (can be empty)
Middlename	||middlename||	(A)	Middle name or initial (can be empty)
Email	||email||	(E)	Email (can be empty)
Gender	||gender||	(A)	Gender (can be empty)
DOB	||dob||	(D)	Date of Birth or Year of Birth (can be empty)
Birthday	||birthday||	(D)	Only Month and date (can be empty)
Address	||address||	(A)	Address (can be empty)
City	||city||	(A)	City (can be empty)
County	||county||	(A)	County (can be empty)
State	||state||	(A)	State (can be empty)
Zip	||zip||	(A)	Zip code (can be empty)
Country	||country||	(A)	Country
Created	||created||	(D)	Date the member record was created
Language	||language||	(A)	Language (can be empty)
Timezone	||timezone||	(A)	3 letters time zone code (can be empty)

The (A) fields tags will include a max length optional parameter, max. If, for example, you write ||fieldname, max||, this will specify that up to first max characters of “fieldname” in the message. ||firstname,7|| will include the first 7 characters of the member’s first name.

The (D) field tags will include a date/time format parameter:

- d1 = mm-dd-yy (Default Format)
- d2 = dd-mm-yy D2
- d3 = yy-mm-dd D3

- d4 = mm-dd (Birthday & DOB Fields)
- d5 = dd-mm (Birthday & DOB Fields)
- d6 = Mon dd (e.g. Mar 24, Birthday & DOB Fields)
- t = HH:SS PM/AM

Examples:

- ||fieldname,d1|| - display date field in d1 format
- ||fieldname,T|| - display time with time zone
- ||created, D1|| will display 11-01-2010.

Let's look at a complete message example:

> "Dear ||firstname,8||, we sent u a message on ||created,d1|| and we didn't hear back from you. Plz call us at 800-123-4567 and mention store id ||storeid||"
>
> ||firstname,8|| = get the "first name" from db limited to first 8 characters.
> ||created,d1|| = get the "created" date from db and enter it in d1 format.
> ||storeid|| = get the "storeid" field for this member

Random Code Tag

||Random, FormatLength|| - You can include a random tag to generate a unique code. The format of the random tag can define if this is a Numeric/Alphanumeric/Alpha type as well as combine lowercase and UPPERCASE characters. The length of the tag defines how many characters will be generated. You can generate a code separated by dash "-" to create a multi-part code.

Format

N or n = Numeric (Digits only)
A = Alphabetic UPPERCASE (Letters Only)
a = Alphabetic Lowercase (Letters Only)
M = Alphanumeric – UPPERCASE (Mixed digits and letters)
m = Alphanumeric lowercase (Mixed digits and letters)

Length

(1) Single digit between 2 to 20: This option will create one continuous code
Example: ||random, N6|| will create a random, numeric number with 6 digits

(2) Hyphenated code: This option will create a Multipart code; each part - separated by dash - can have different number of characters
Examples: 4-4 (9 characters long code); N4-4 can generate 6782-9164
3-3-3 (11 characters long code); M3-3-3 can generate H32-3KS-W9R
3-2-4 (11 characters long code); a3-2-4 can generate ndc-gv-wkma

Code Generation

To eliminate confusion on the part of people reading the code on a phone, we do NOT use the following numbers and letter in the random:
Numbers: 0, 1
Letters: O, I, o, l (lowercase L)

Examples:

- Congrats ||firstname,7|| ||lastname,10|| you joined us on ||created||. Plz go to www.HelpHunger.com and enter code ||random,M3-3-3|| To finalize ur application.
- Congrats ||firstname,8|| for joining our Mobile VIP Club. Plz call 800-123-4567 and enter code ||random,N6|| To finalize ur application.

Now (Date) Tag

||Now[+/-n H/D/W/M/Y], [Timezone], [Format]|| - You can include a date tag that will generate a date based on date/time now. A date will be automatically generated by the system, based on Now (the current date & time). You can include a +/- delta (hours, days, weeks, months, years) from Now() and decide if the date should consider the recipient time zone (if available) or a specified time zone.

The format of the Now tag defines the appearance of the date in the message and it takes the same formats like any other Date field that is stored in the database.
Let's use an example: You have a campaign that responds to the keyword PROMO and you want the member to receive a special promo with a time limit of 3 days after they received the promo message. Since you don't know when members will text PROMO, you need a dynamic way to generate the date, here is how: include the tag ||Now+3D, PST, D1||. So, if the member sent PROMO on 09-10-2011, then the system will generate the promo response message with the date 09-13-2011

Now Tag Parameters

Now +/- Delta options:

1) aH = No. of hours to add/subtract from. Example: +6H, -12H
2) bD = No. of days to add/subtract from. Example: +7D, -5D
3) cW = No. of weeks to add/subtract from. Example: +1W, -2W

4) dM = No. of months to add/subtract from. Example: +3M, -3M
5) eY = No. of years to add/subtract from. Example: +7Y, -1Y

Time Zone Options:

1) PST, PDT
2) MST, MDT
3) CST, CDT
4) EST, EDT
5) GMT+/-1-23 (e.g. GMT+2)

Presentation Format options:

1) d1 = mm-dd-yy (Default Format)
2) D1 = mm-dd-yyyy
3) d2 = dd-mm-yy
4) D2 = dd-mm-yyyy
5) d3 = yy-mm-dd
6) D3 = yyyy-mm-dd
7) t = HH:SS PM/AM
8) T = HH:SS PM/AM (EST/CST…)

Examples:

- Congrats ||firstname,7|| ||lastname,10|| you are the winner of our big prize. Plz arrive to our store on 123 main street until ||NOW+1W, CST, D1|| to claim ur prize.
- Congrats ||firstname,8|| for joining our Mobile VIP Club. Ms. Smith will call you on ||now+1W, EST|| to introduce you to the specials of the VIP club. Plz call 800-123-4567 if you need to reschedule.

Notes:

1. In the second example, the tag is using the default date format (d1), so it doesn't need to be included.
2. The simplest way to use this tag is: ||now|| - This will show today's date, based on EST time zone, with the format mm-dd-yy

Text 2 Win Counter Tag

||T2WCOUNTER, [X][n]|| - This is a specialty tag for Text 2 Win campaign where many members text a keyword and the system keeps count of how many texted in. Each message that was received is assigned a number based on the order in which it was received (like in a queue) and this number can be used as a tag in the response message.

The optional parameter X of this tag allows you to select if the system should present the actual counter number or the remainder of diving the counter by X. This way the number the system will generate for this code will always be between 1 and X-1.

The optional parameter n, can be replaced by any number between 1 and 9 to set how many digit will be used to show the counter value. E.g. ||t2wcounter,3|| will show 001.

Here's an example: You have a T2W-X where every 50th member wins. Since 49 out of each 50 are not winning, you want to let them know their number out of 50, so that they feel it was a fair game. So, you can include the T2WCOUNTER tag in your Non-Winner response message, ||T2WCOUNTER, X2||. In this example, the tag will return the numbers 01 to 49.

Other examples:

- "Sorry, you didn't win. You were number ||t2wcounter,x|| out of 50."
- "Your message arrived in number ||t2wcounter,3|| today and only every 50 wins. You can try your luck again tomorrow after 6PM."

Preview Window

With tags, it is a little more complex to compose a text message without making mistakes. The preview window should assist you to ensure that the outcome represent the indented message.

Textboom holds a "Preview Member" that has all member fields populated. This "Preview Member" is used to show you what a real message would look like when the tags are replaced with actual data stored in the database.

"Preview Member" Fields:

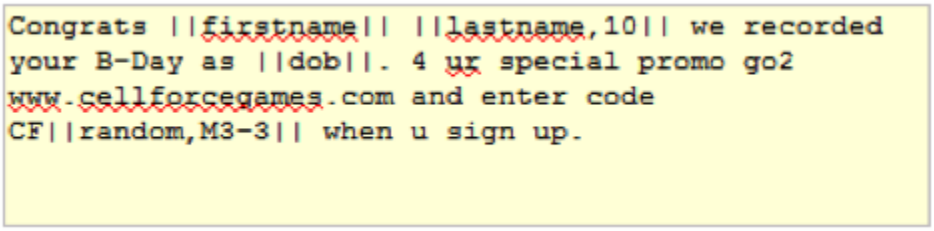
Cellphone: 19999999999
Carrier: AT&T Wireless
Firstname: Jane
Lastname: Richards
Email: jrichards@mail.com
DOB: 11-02-1980
City: Mobile
State: Alabama
Zip: 36617 Country: United States
Optinsource: www.website.com
Created: 12-15-2009

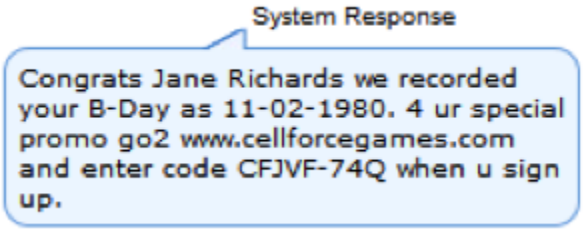
So, when the user enters tags, they will be showing the respective values of the "Preview Member" record fields from above:

Example:

1. Campaign
2. Message
3. Destination List
4. Launch & Expiration
Message:
154/160 chars.
Congrats ||firstname|| ||lastname,10|| we recorded your B-Day as ||dob||. 4 ur special promo go2 www.cellforcegames.com and enter code CF||random,M3-3|| when u sign up.
Previous
Next
Preview Campaign
System Response
Congrats Jane Richards we recorded your B-Day as 11-02-1980. 4 ur special promo go2 www.cellforcegames.com and enter code CFJVF-74Q when u sign up.

Here's a closer Look:


Congrats ||firstname|| ||lastname,10|| we recorded your B-Day as ||dob||. 4 ur special promo go2 www.cellforcegames.com and enter code CF||random,M3-3|| when u sign up.


System Response
Congrats Jane Richards we recorded your B-Day as 11-02-1980. 4 ur special promo go2 www.cellforcegames.com and enter code CFJVF-74Q when u sign up.

Web

A **Web Widget** is a tool that you configure, which allows users to opt-in to a list on a website. Once you configure the settings, custom code is generated for an embedded or pop-out widget.

In this chapter we explain how to create and manage widgets. Learn about each in the following topics.

- Web Widget Manager
- Widget Wizard

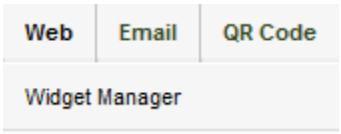
You may access these tools from the **Web** menu in the **Textboom** toolbar or from the quick link

icon on the Dashboard.

Web Widget Manager

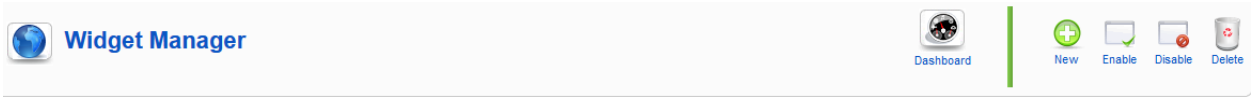
The **Widget Manager** displays a listing of all widgets for your account. You can filter by **OC (Operating Company)**, **Agency**, **Client**, or **Status**. You can edit, disable, re-enable, and delete widgets. You may also perform a search for a specific word or number. The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time.

You may access this feature by choosing **Web > Widget Manager** from the toolbar.



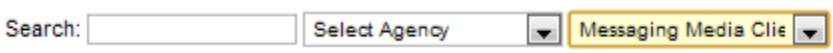
You can also access the SMS Campaigns by utilizing the quick link icons that are located under the toolbar on the Dashboard.

After choosing this menu item, you'll see a page having the characteristics which we describe below.

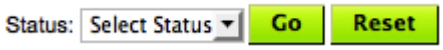


Filters

On the left side of the report control panel, you'll find a group of filters (below). Choose from one or more of these drop-down menus to filter by **OC (Operating Company)**, **Agency**, **Client**, or **Status**.



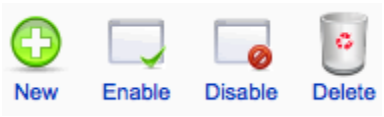
Along with these filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.



Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Add, Enable, Disable, or Delete Widgets

In the upper right corner of the page, locate these icons:

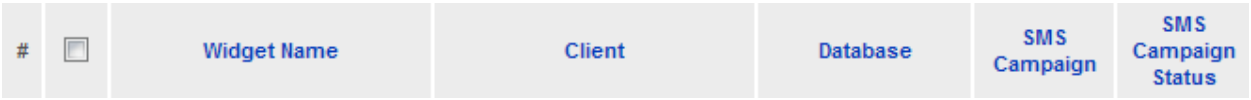


Check the box next to any record, and then click the icon that corresponds to the function you want to apply:

- **New** - add a new widget.
- **Enable** - enables a record that has been previously been disabled.
- **Disable** - Click this icon to disable the widget. A disabled widget cannot be used again until it is enabled.
- **Delete** - click this icon to delete the widget. A deleted widget is both disabled and invisible.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see a list of all your widgets.



Managing Widgets

At the extreme right end of each record in the listing you'll find a series of small icons:

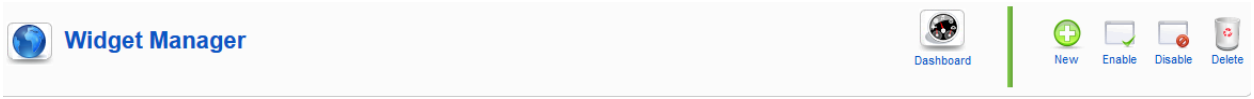
Click this icon to preview the widget in a popup window.
Click this icon to edit the widget (you will exit the Widget Manager).
Click this icon to disable the widget. A disabled widget cannot be used again until it is enabled.
Click this icon to delete the widget. A deleted widget is both disabled and invisible.

Create a Web Widget

The **Widget** feature is a tool for creating an HTML widget that you can insert into a forms or display as a popup. We provide you with many options, and yet it's quite easy to setup.

You may access the **Widget** feature by choosing **Web > Widget Wizard** from the toolbar.

Or by clicking on **New** in the **Widget Manager**.

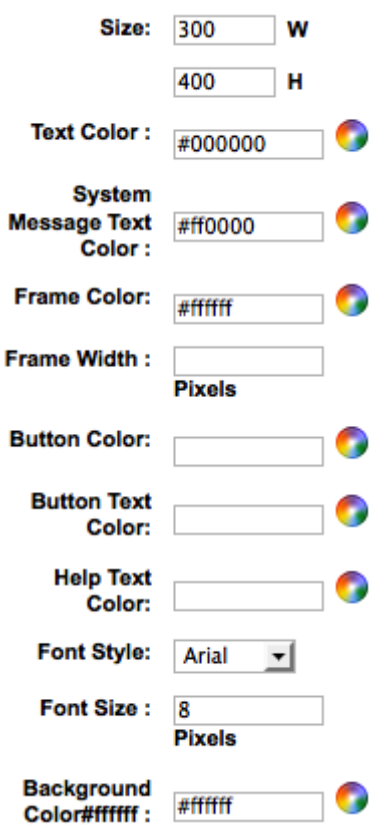


After choosing this menu item, you will see a page much like the figure below.

Configuring the Widget

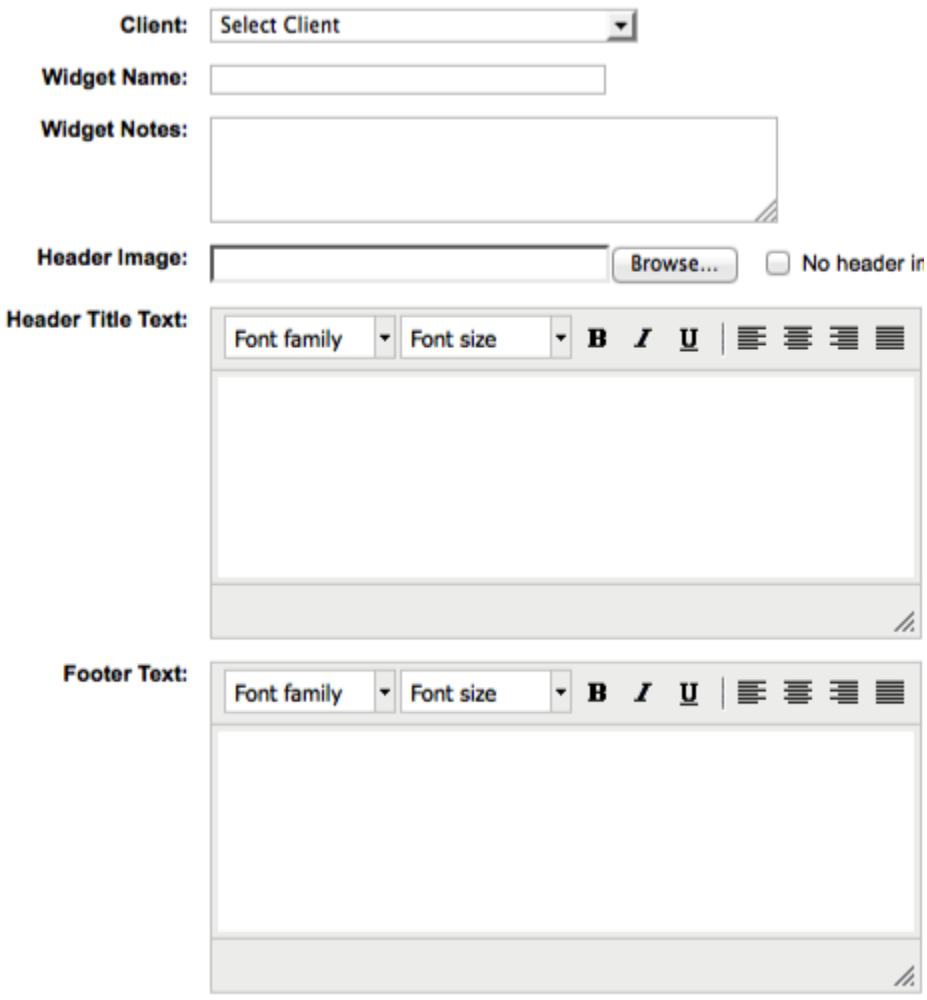
Notice the **Widget Look & Feel** section on the left side of the page. To begin, follow these steps:

1. The default size for the widget is 300 pixels wide by 400 pixels high. If you want to specify different dimensions, enter new values for Size in the width (**W**) and height (**H**) fields.
2. Next you may optionally choose different colors for **Text, System Message Text**, or the **Frame**. Click the circular icon next to these fields and choose the color.
3. Typically, the width of a frame border is only a few pixels. If you want a thicker border, then enter the value (in pixels) for **Frame Width**.
4. If you like, change the colors for the **Button, Button Text**, and **Help Text**.
5. You might like to choose a different **Font Style** from the drop-down list, and also change the **Font Size**.



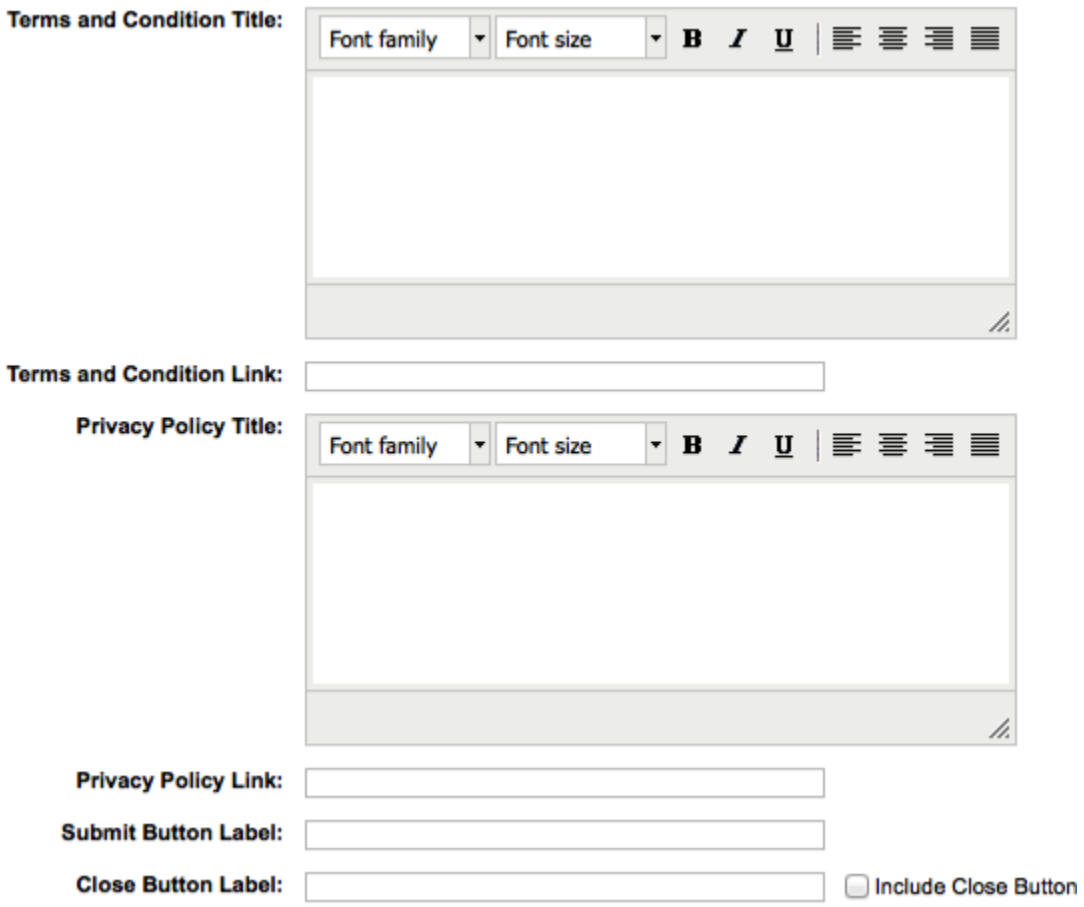
Widget Profile and Content

In the center of the page, you'll see a number of fields that you use to create the widget profile and content:



Follow these steps:

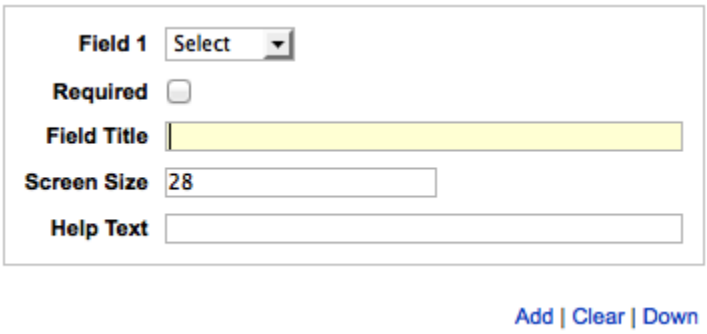
1. Click the **Client** drop-down list, and then select the correct client name.
2. Enter a **Widget Name**.
3. Optionally, enter the **Widget Notes**.
4. Click the **Browse** button for the **Header Image**. This image will appear at the top of the widget. If you don't want a header image, check the **No Header Image** box.
5. Next, enter the **Header Title Text**. Using the small toolbar in this panel, you may also change the font family, font size, and other formatting options. You can also resize this panel (and the others below) by grabbing the lower right corner of the panel and dragging it outward.
6. You can also enter the **Footer Text**. As before, you may change the formatting using the small toolbar in this panel. (steps continue below the next figure).



7. Optionally, you can enter a **Term and Condition Title** and a **Terms and Conditions** link.
8. If you like, you may enter a **Privacy Policy Title** and a **Privacy Policy** link.
9. If you want something different than the default, then enter the text in the **Submit Button Label** field.
10. If you want to place a button that can close the widget without submitting, check the **Include Close Button** box. Optionally, enter the text for the label in the **Close Button Label** field.
11. Click **Next** to move on to the **Data Fields** step of the wizard.

Data Fields

In this step, you'll add fields to the widget. Here is the first view of the page:



Add data fields to the widget by following these steps:

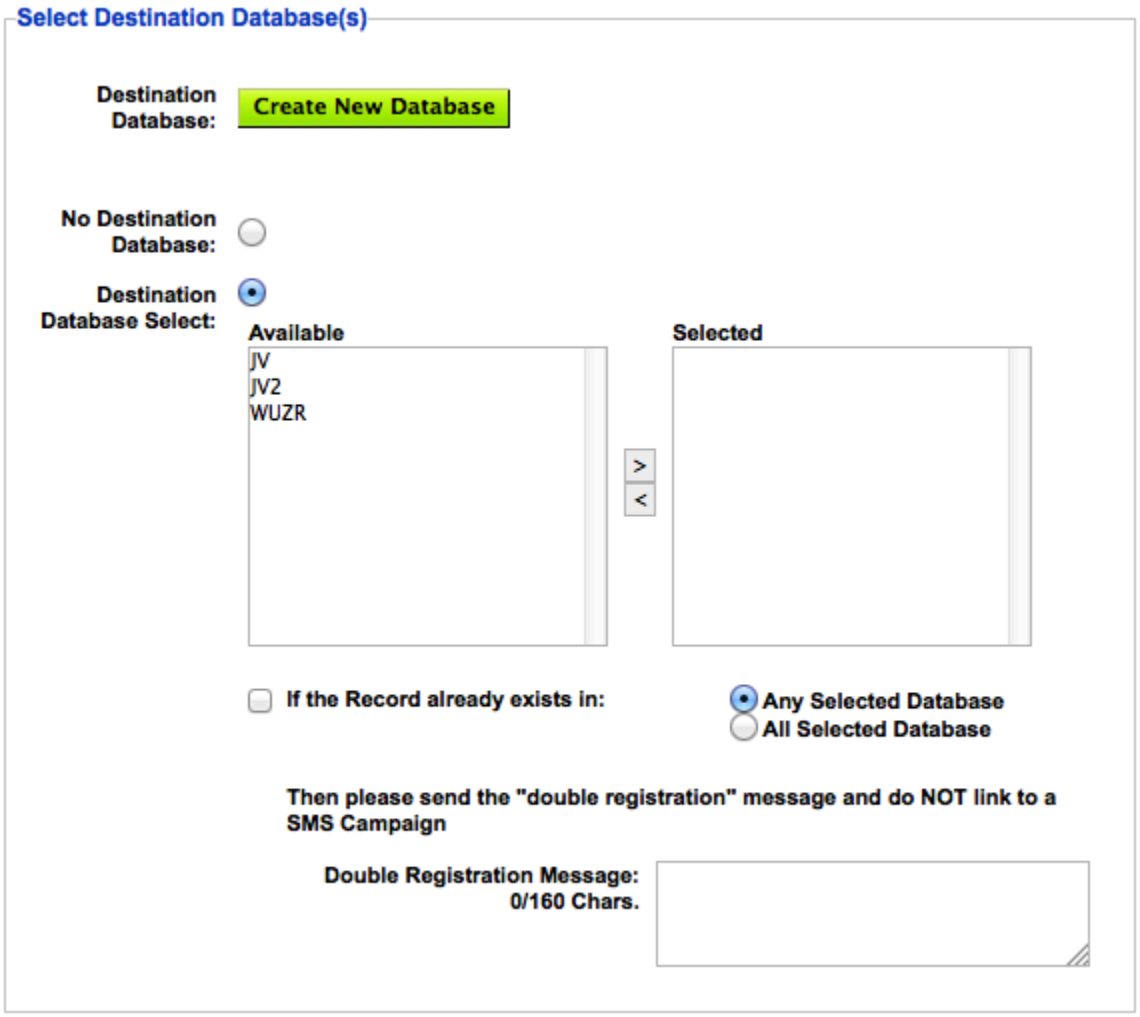
1. Choose the field type from the **Field 1** drop-down listing.
2. Check the **Required** box if this data field is mandatory.
3. Optionally, in **Field Title**, enter a different label for the data field.
4. If you want a narrower or wider field, decrease or increase the value of **Screen Size**.
5. You may also add **Help Text**, which will display a hint when the user hovers over the field with the mouse pointer.
6. The first field is now complete. To add another, click the **Add** link.
7. To configure another field, follow the same steps above for the second field.
8. You can move a field downward by clicking the **Down** link.
9. Click the **Clear** to wipe the properties of a field; click **Remove** to delete a field.
10. Click **Next** to move on the **Database & SMS Campaign** step.

Database & SMS Campaign

In this step, you'll choose (or create) the database in which you want to associate with this widget. If no database exists, you may create one by following these steps:

1. Click **Create New Database**.
2. Enter a **Database Name**.
3. Check the box for **Send Subscription Renewal Msg?** if you want to send a monthly renewal message to your database.
4. Click **Submit** to commit your changes; click **Cancel** to discard.

You may choose to avoid database selection entirely by selecting the **No Destination Database** radio button. If you do want to associate an existing database with this widget, then look to see that at least one database already exists in the **Available** listing. Follow the steps below to manage your databases.



To choose one or more existing databases:

1. Click the database name in the **Available** listing, then click the right arrow to move the database name to the **Selected** listing.
2. If you want to take action when a duplicate entry is found in a database, check the **If Record already exists in** box. Then, decide if you want to check all databases by clicking the **All Selected Databases** radio button.
3. In the **Double Registration Message** field, enter the text that you want to send if a duplicate record is found.

Submit Actions

At the bottom of the **Database** page, you can choose to perform one of several actions after the user clicks the **Submit** button in the widget. Simply follow these steps:

Confirmation Message

1. To display a confirmation message, first check the box for **Confirmation Message**.
2. If you want to simply display a message within the widget, click the option for **Send confirmation message to the widget** and enter the **Confirmation Message**.
3. Instead, if you want to redirect to another page to display the message, click the option for **Go to a confirmation page**, enter the **URL**, and then (optionally) choose to display the target web page in a **New Window**.

Text message to recipient's phone

1. You might also want to send a confirmation text message to the phone number in the database record. If so, then check the box for **Send Text Message to the Record's phone**.
2. Enter the **Confirmation Message**.

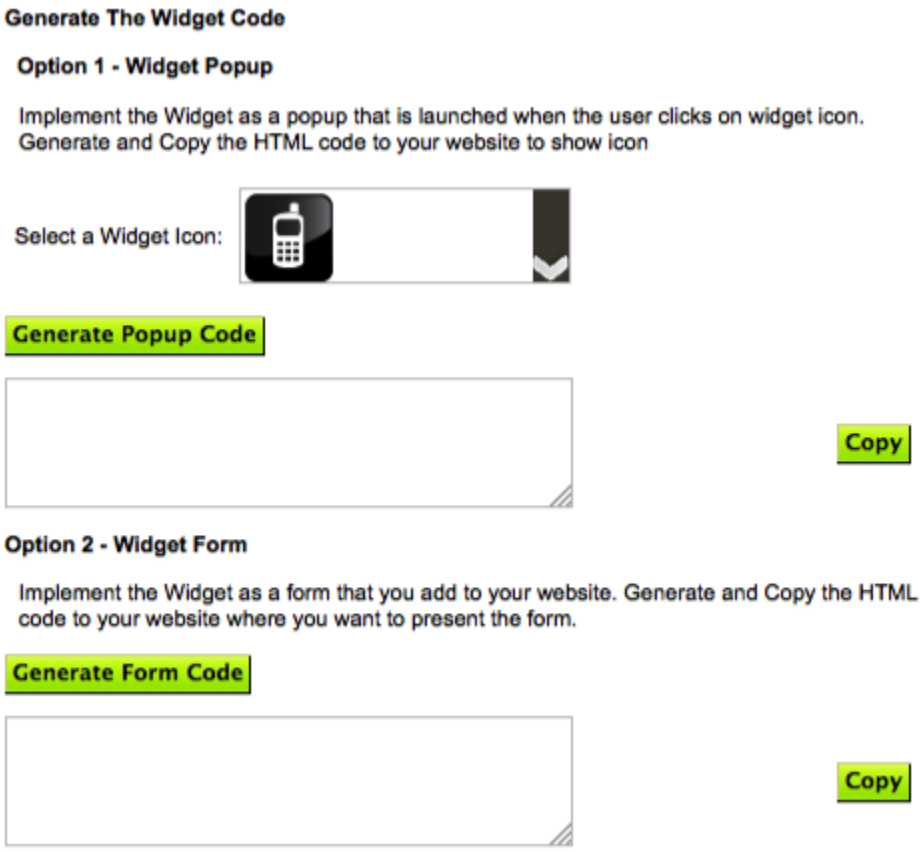
Activate a SMS Campaign

1. You can also initiate a campaign by checking the box for **Activate a SMS Campaign**.
2. From the drop-down listing, choose the campaign you want to activate.

When you are done, click Next to move on to the final step of the wizard, **Generate Code**.

Generate Code

This is the last step, in which you generate the code for use in your campaign. You have two options: You can generate code for the widget to appear either in a popup window or a form. Here is the view of the page:


Generate The Widget Code
Option 1 - Widget Popup
Implement the Widget as a popup that is launched when the user clicks on widget icon.
Generate and Copy the HTML code to your website to show icon
Select a Widget Icon:
Generate Popup Code
Copy
Option 2 - Widget Form
Implement the Widget as a form that you add to your website. Generate and Copy the HTML code to your website where you want to present the form.
Generate Form Code
Copy

Widget Popup

1. If you want the widget to appear as a popup, click the **Generate Popup Code** button.
2. Click the **Copy** button and then paste the code into a text editor of HTML editor.

Widget Form

1. If you want to embed the widget into a form, click the **Generate Form Code** button.
2. Click the **Copy** button and then paste the code into a text editor of HTML editor.

Click the **Save** button to commit your changes and complete the wizard.

QR Codes

You can create QR codes (Quick Response) for use with your campaigns. You have a choice of four types of codes: Short URL, Text/Web Address, Phone Number, or SMS message. In the topics below we explain how to create and manage QR Codes.

- Create a QR Code
- QR Code Manager

Why did we update our QR Code functionality?

As part of our ongoing commitment to position **Textboom** as the leading consumer engagement platform, we now present our redesign of entire QR code section. Our users will now enjoy advanced design features that take the look and feel of the QR code into new realms. They will also enjoy the enhanced QR campaign functionality that expands QR code usability and introduces new opportunities and utilization options.

You may access these tools from the **QR Code** menu in the **Textboom** toolbar or by the quick link QR Code

icon.

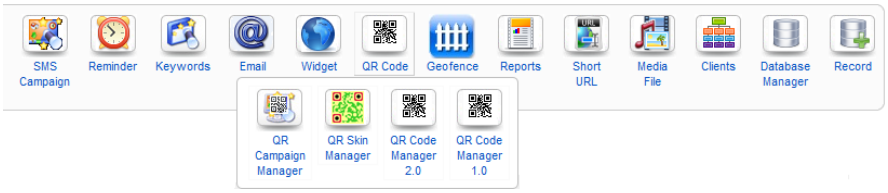
QR Skin Designer

The **QR Skin Designer** is a tool for editing your QR skins.

You may access this feature by choosing **QR Code > QR Skin Designer** from the toolbar.

Don't forget that you can access the SMS Campaigns and features by utilizing the quick link QR Code

icon that is located under the toolbar on the Dashboard.



To design a QR skin, follow the steps below:

1. Begin the design process by defining the **QR Code** size, **ECC** (error-correcting code) level and frame.

2. Coloring your QR code can be as simple as choosing a foreground / background color. Or, if you want to reach for a more impressive look, apply linear or radial gradient effects and then preview it in real-time.

NOTE: At anytime, you may verify if a scanning app will recognize the visual changes applied on the QR. Simply click the **Test** button underneath the QR Code image.

3. You can now upload your logo on to the QR Code.

NOTE: After you upload a logo, you may move and manipulate it anywhere on the canvas. To change the logo size, grab the right or bottom edges and drag it out to the size you want.

4. You may also change the inside and/or outside colors of the QR code squares. To customize it further, consider uploading images into the center of each square in the QR code.

Keep in mind that it's no longer necessary for QR Codes to have a square shape. You may add a border to a QR code in order to create a circle, star, triangle or other shapes. Either select a template shape-or upload your own. The color and effect of the QR code can be applied to the template shape by selecting the **Apply Color on Shape** checkbox.

You may also superimpose any image to have it show through the color (or black) of the QR Code.

NOTE: The superimposed image will not show until you save the QR Code.

QR Campaign

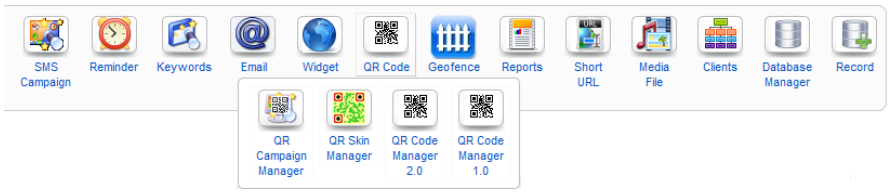
The QR Campaign is designed to give users the ability to change the actions that occur when a consumer scans the QR code. Why settle for a single QR function-such as [go to a web address] or [dial a phone number]-when you can now change the QR function as time progresses?

Consider this example: A retailer launches a new product, and initially sets up the QR Code to send the consumers to see a movie about the product. At the time of product launch, the same QR Code will send the consumers to the product web page. However, after some time passes, the product may be discontinued, and yet the same QR code will send the consumers back to the retailer home page. Here we see that a single QR code serves many purposes and is driven by a timeline that is setup by the retailer. This is the feature that we offer here in **QR Campaign**. When you setup your QR campaign, you may add any of the available actions to the timeline. A QR action will correspond to each segment on the timeline, and it will be active between the time set and the start of the next timeline segment. If no action is set to follow, the QR will act as a static campaign.

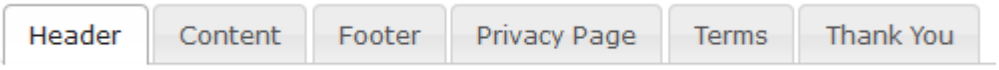
You may access this feature by choosing **QR Code > QR Campaign Skin Designer** from the toolbar.

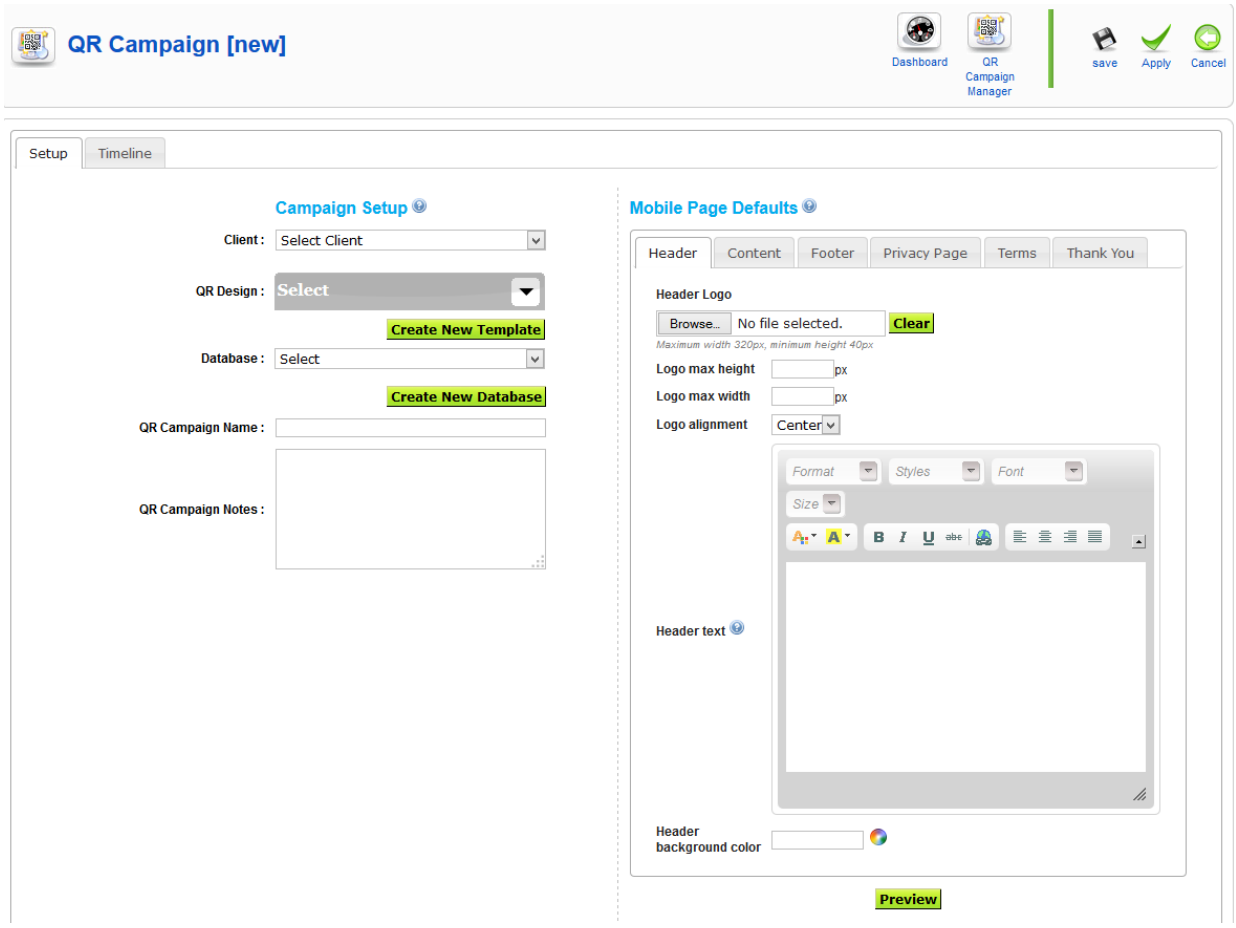
Don't forget that you can access the SMS Campaigns and features by utilizing the quick link QR Code

icon that is located under the toolbar on the Dashboard.



Begin setting up your campaign by selecting the client (if applicable), QR Skin Design, Database (to store records if you choose data collecting actions) and giving a name to the campaign. The right side of your screen shows the **Mobile Page Default**s parameters to be set by the user. These are settings applied to the mobile web page that display your QR action's content. Settings can be applied to the **Header**, **Content** area, **Footer**, **Privacy Page**, **Terms** and **Thank You** page. Please note, these are default settings for the entire campaign. However, you may assign different settings for each web page.





NOTE: You may, at any time, preview your work by selecting Preview below the defaults window. See an example preview image below.

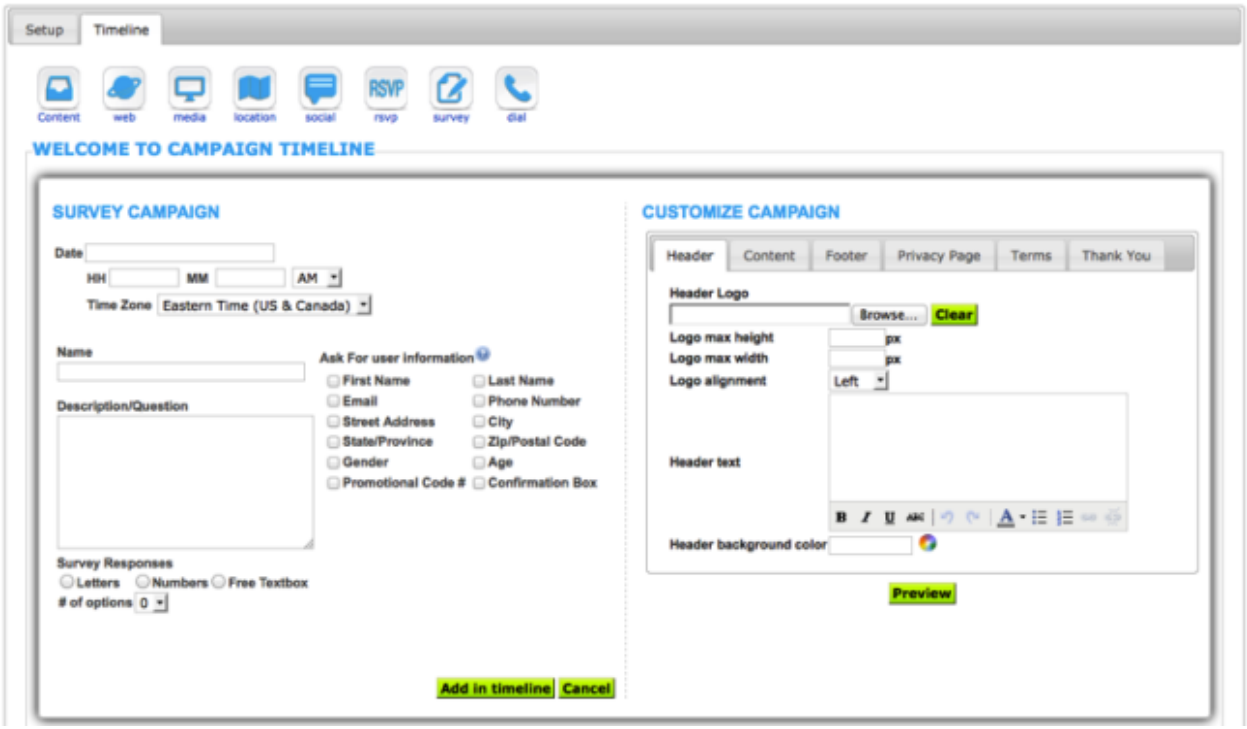
9:58 AM
content
Powered by LC Fit
Uploaded Header
Content background color
Footer background color with text

QR Campaign

Each QR Timeline Action page will have two sections for you to complete. The left section defines the date, time, action, content, and so on. The right section offers options for creating a unique web page settings for that specific action. The settings defined in the right section will ONLY show for that action. If you do not wish to change these settings, the **Mobile Page Defaults** under the SETUP tab will be used.

QR Actions

Content – The **Content Action** is designed to display text for viewing purposes only. Links, phone numbers and email addresses will be hyperlinked for click-through and click-to-call actions.

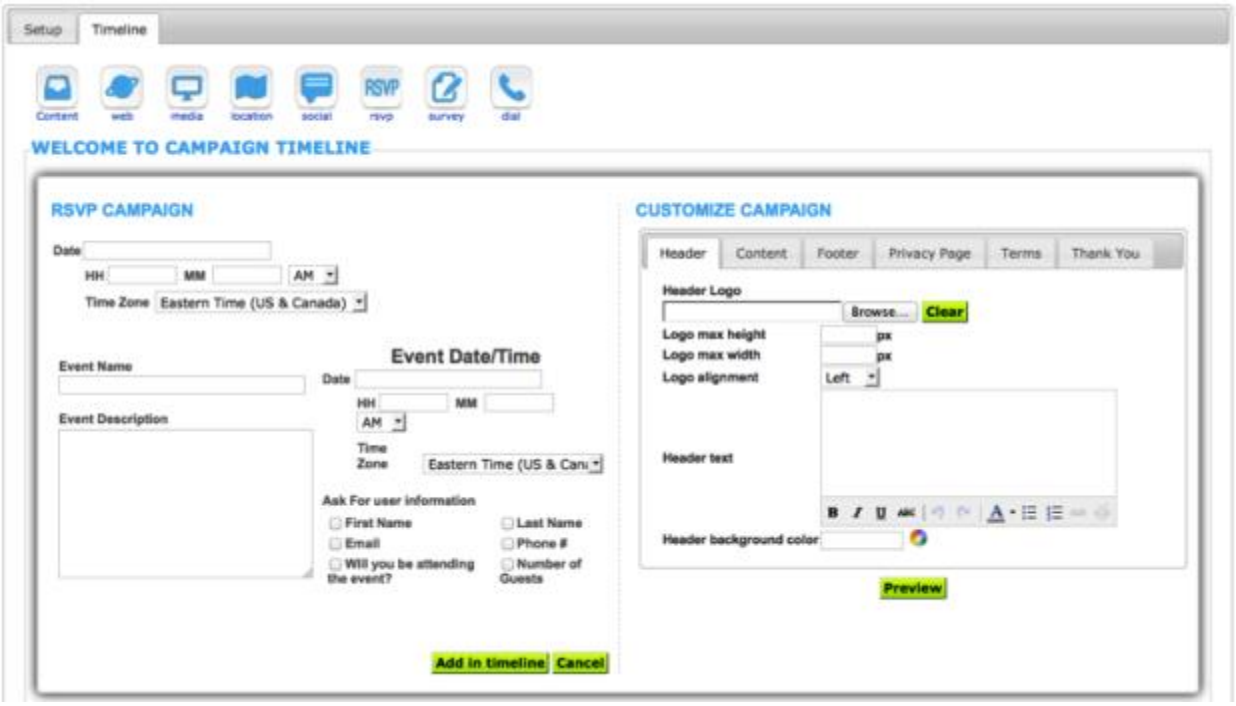


NOTE: Once your settings are saved, your QR Code will appear on the Timeline. See below.

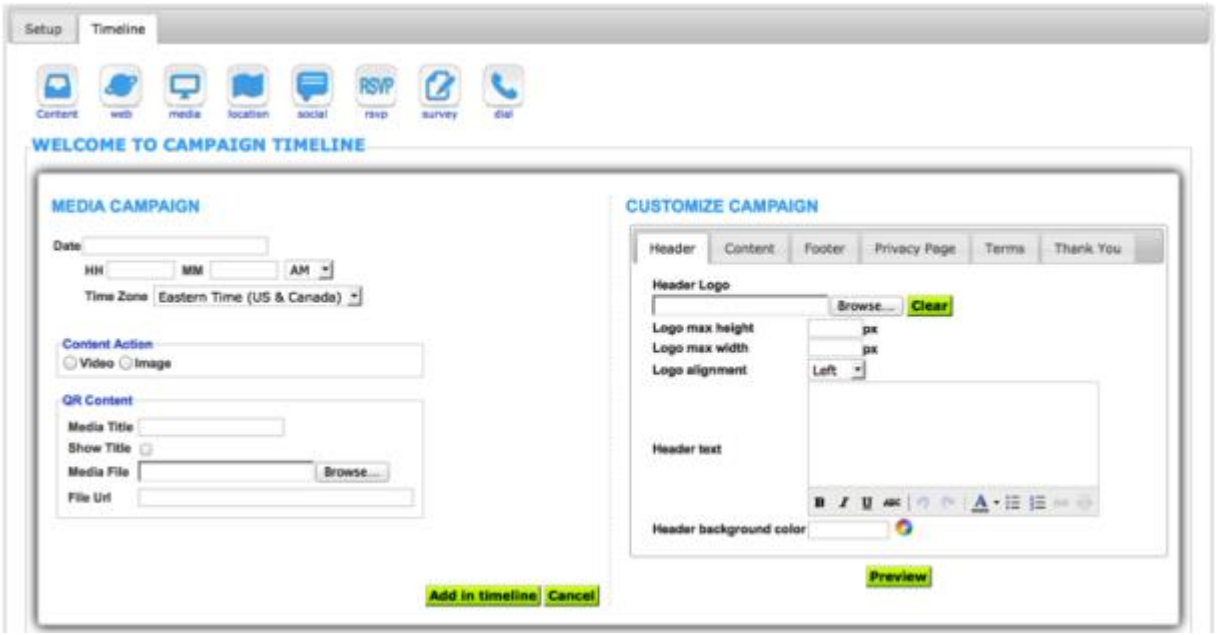
The timeline displays your skin, date and time of action, title, a portion of the content and the ability to **Edit**, **View QR** and **Preview** the content or action.

Setup
Timeline
WELCOME TO CAMPAIGN TIMELINE
September 17, 2012
LC Fit QR TL Campaign 1
Contact me @ 1800...
content

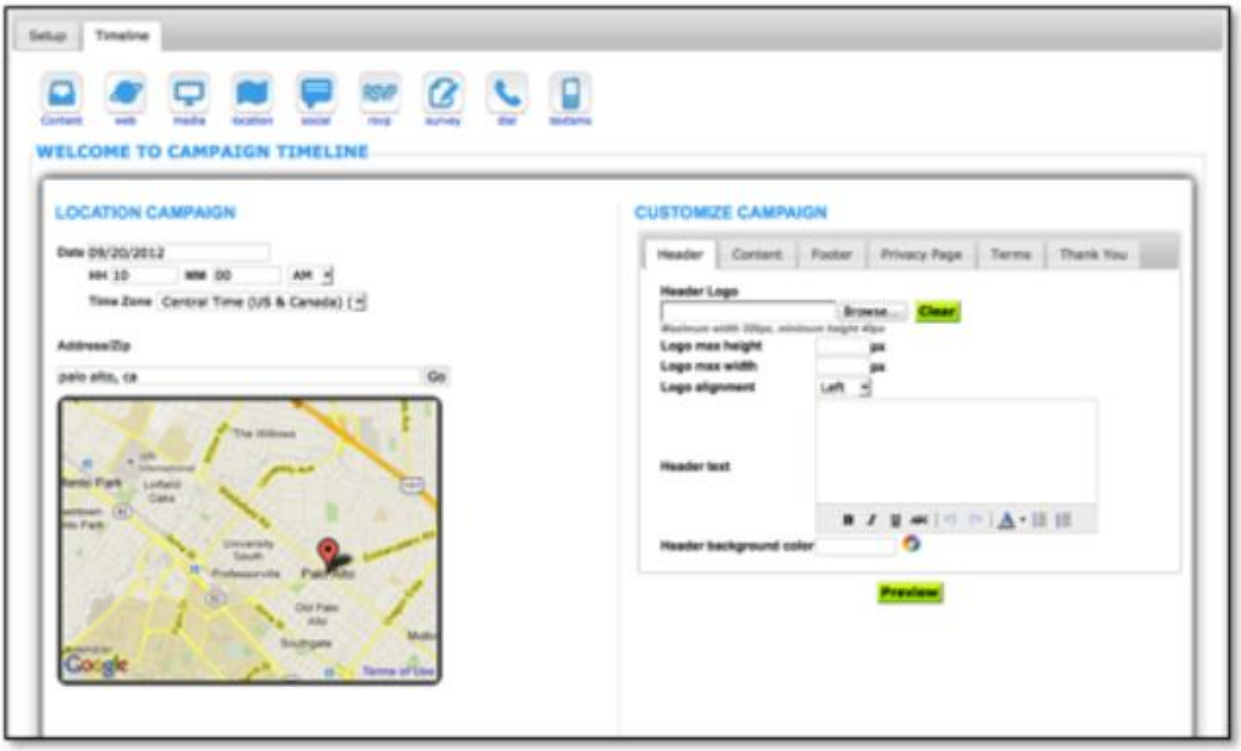
Web – The web action will direct traffic to your specified web address.



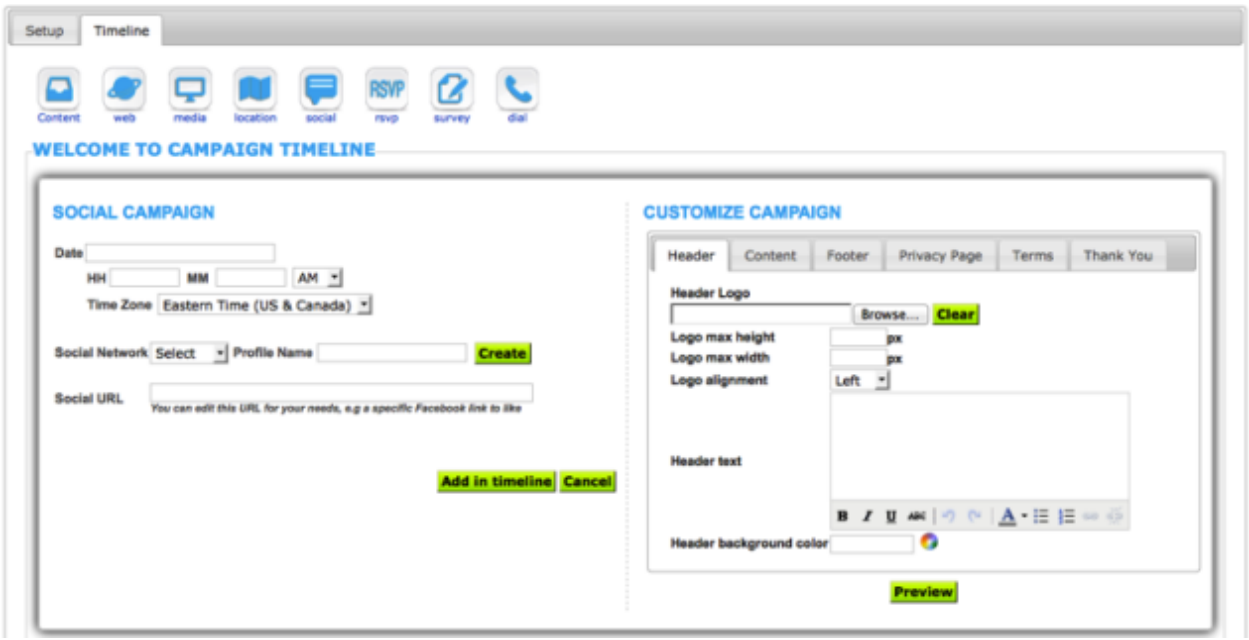
Media – Through the **Media** feature, you can provide rich media: images, videos and music(up to 3GB per file!!!).



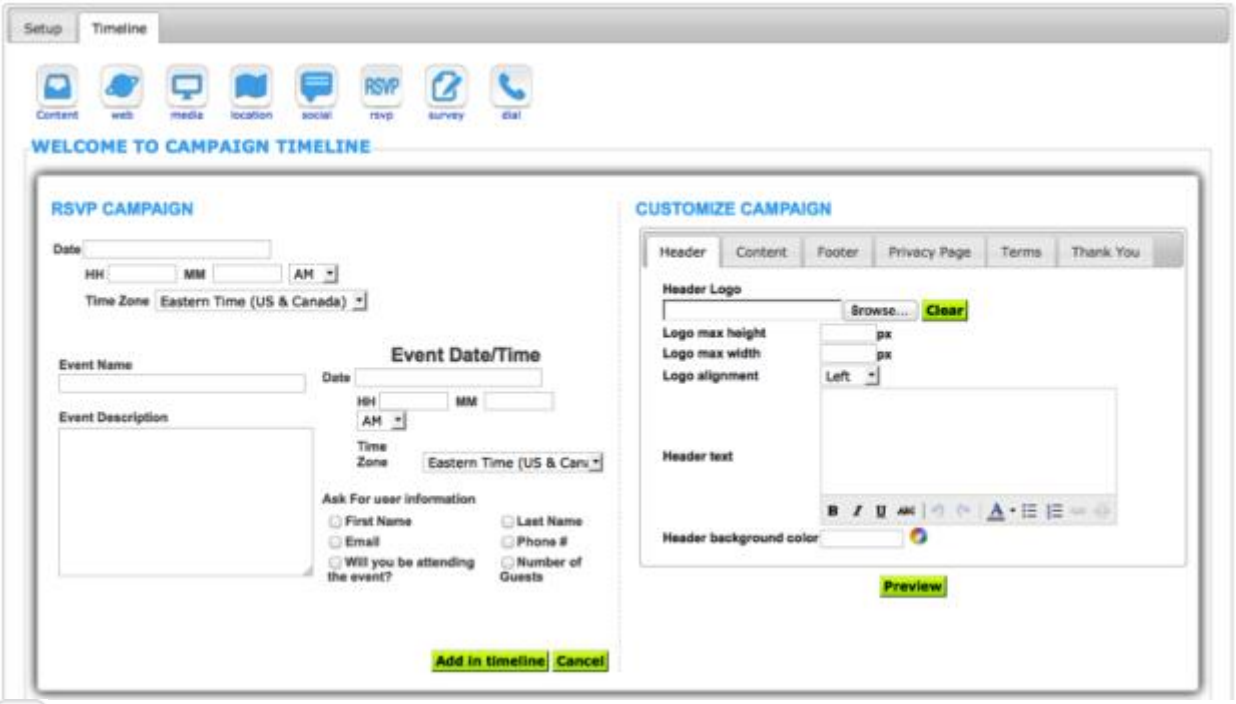
Location – Navigation, directions or location can be added via the **Location** tab.



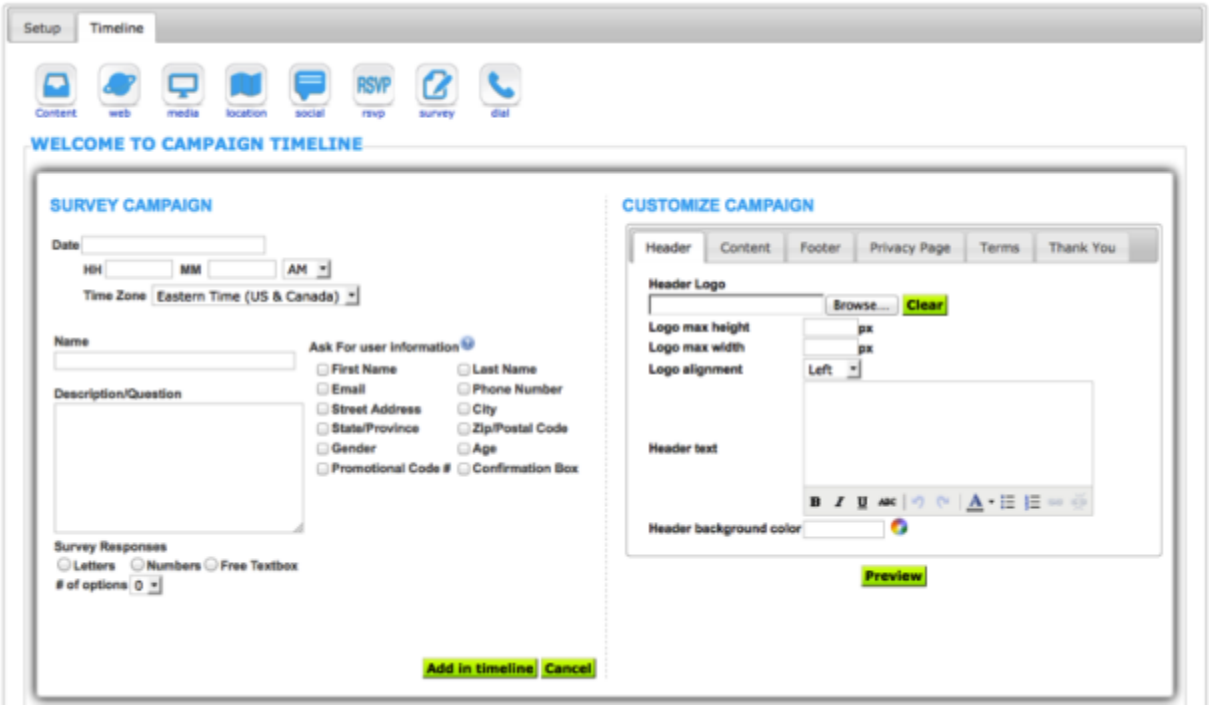
Social – Connect your audience to your Facebook, Twitter, Linked In or YouTube pages.



RSVP – Create a beautiful mobile page for guests to respond to your invitation. Ask your guests for their first name, last name, email, guests, etc…



Survey – Use this action to create surveys, feedback forms or voting polls. You may have up to 10 options and ask users for different kinds of information.



Dial – Users will dial a phone number with a click of a button.

QR Code Manager - Statistics

Each campaign (except SMS) will have a statistics report that highlights the most important aspects of the campaign including: time, type of device used to view the content, the QR scan location, and any other data collected through the campaign (ex. Survey, RSVP, etc).

QR Wizard 2.0

The QR Wizard 2.0 is similar to the original QR Wizard, with the addition of new skin designer options. Your basic QR functions remain available including: Short URL, Text / Web Address, Dial and SMS.

Geo Fencing

Geo Location is an advanced SMS campaign feature that targets mobile users by geographic location. We recommend promoting this as a special campaign which notifies users that their location will be "pinged" or checked before a message is sent to them. If a particular mobile user is within a "fence" that you define-known as a GeoFence-they will receive a text. If the mobile user is outside the GeoFence, no text will be sent to them. You manage all of the settings from within this feature, including ping intervals, fence definitions and database relationships.

Access this feature simply by choosing **Geo Fencing** from the toolbar.

Don't forget that you can access the SMS Campaigns and features by utilizing the quick link Geofence

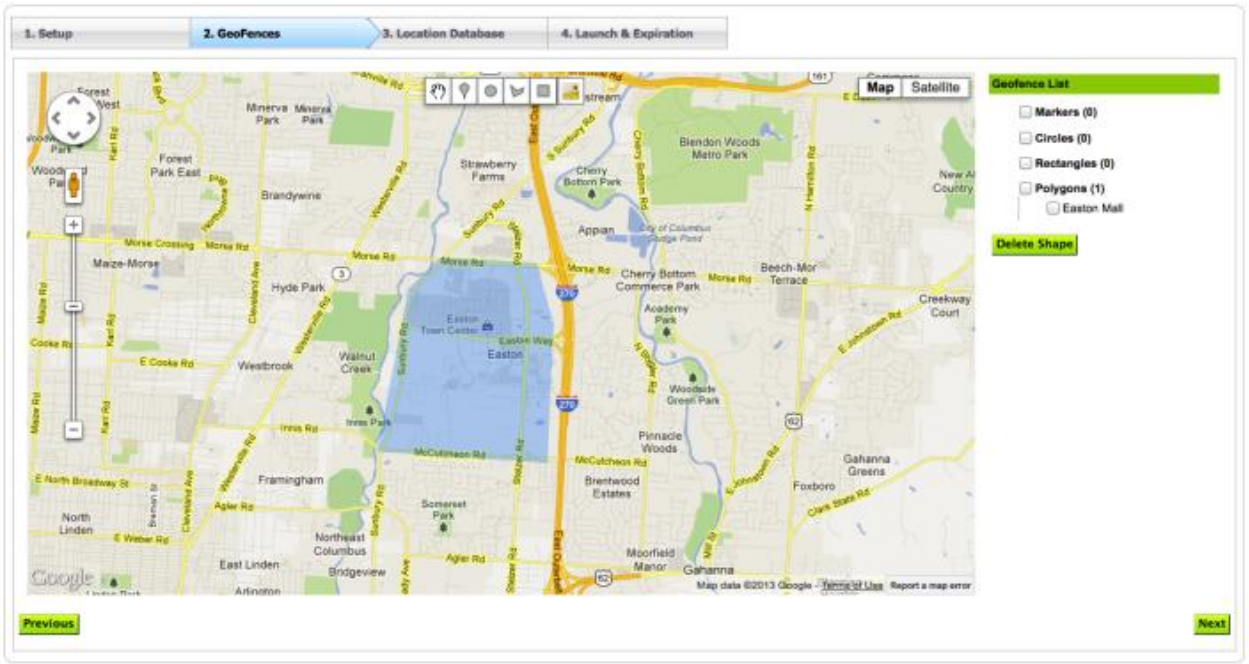
icon that is located under the toolbar on the Dashboard.

A new page will appear-like the figure below:

Geo Fencing Wizard : [edit]
Dashboard
Geo Fencing
1. Setup
2. GeoFences
3. Location Database
4. Launch & Expiration
Settings
Brand : Easton Sweeps
Geo Campaign Name: Easton Sweeps
This is the actual campaign that will start 11/21 for live test.
Geo Campaign Note:
No Limit on positive pings
Location Ping Limits:
Limit campaign positive location pings to 1 per 5 Day(s)
But not more than 4 per 1 Campaign(s)
Next

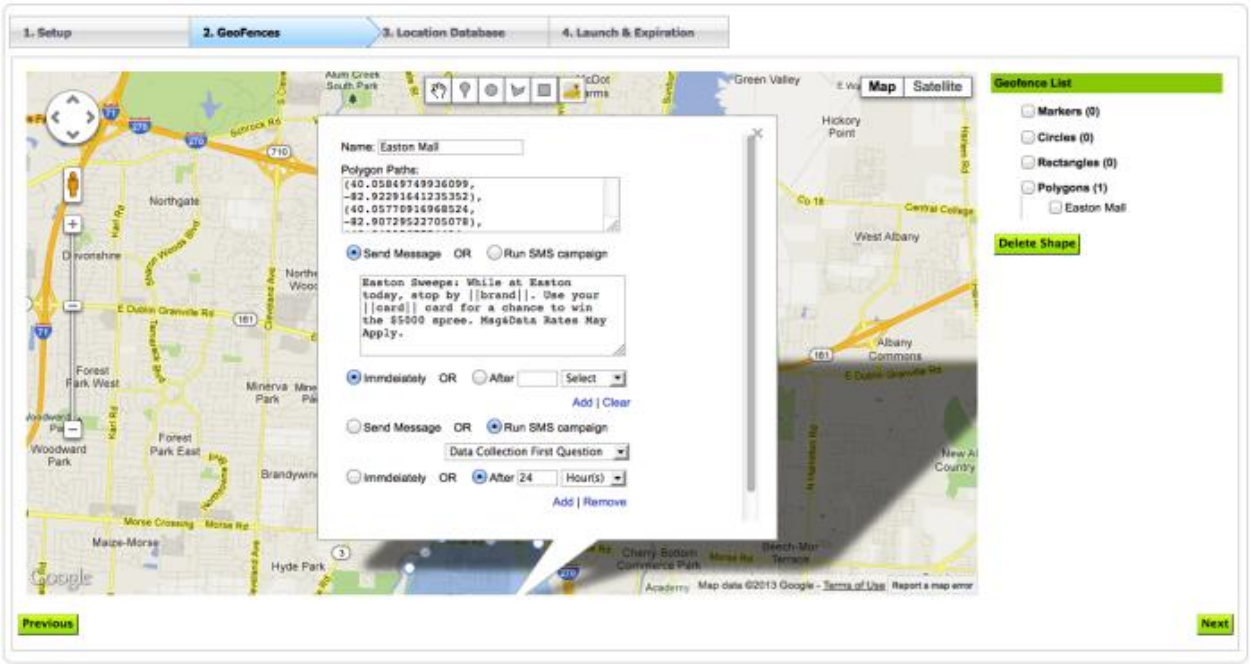
Follow these steps to create a GeoFence:

1. There are four tabs of information: **Setup**, **GeoFences**, **Location Database**, and **Launch & Registration**.
2. In the **Setup** tab, enter a **Geo Campaign Name** and, optionally, a **Geo Campaign Note**.
3. Choose one of the two options for **Location Ping Limits**. You may either have no limits, or set upper and lower limits for the number of pings per period.
4. Click the **Next** button to move to the second tab, **GeoFences**.

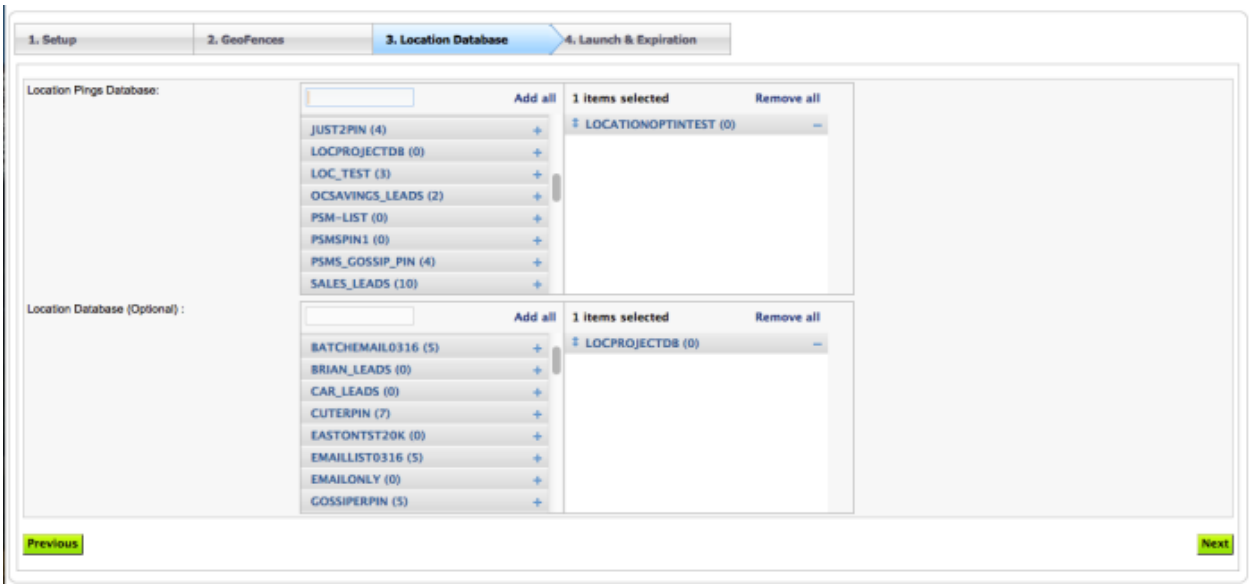


5. Set the map to contain the area in which you want to contain your GeoFence.

6. To draw a circular GeoFence, click the circular fence icon in the map toolbar, then stretch the circle to the dimensions you need, then let go of the mouse button.
7. To draw an irregular GeoFence, click the irregular fence icon in the map toolbar, then click the location on the map that will be the start of your fence, then draw a line to the first corner of your fence, and continue until you have drawn a complete enclosure.
8. To draw a square or rectangular GeoFence, click the rectangular fence icon in the map toolbar, then stretch the rectangle to the dimensions you need, then let go of the mouse button.
9. To add a marker, click the marker icon on the map toolbar.
10. After you complete your fence, a callout balloon will appear that lists all the properties of your GeoFence.



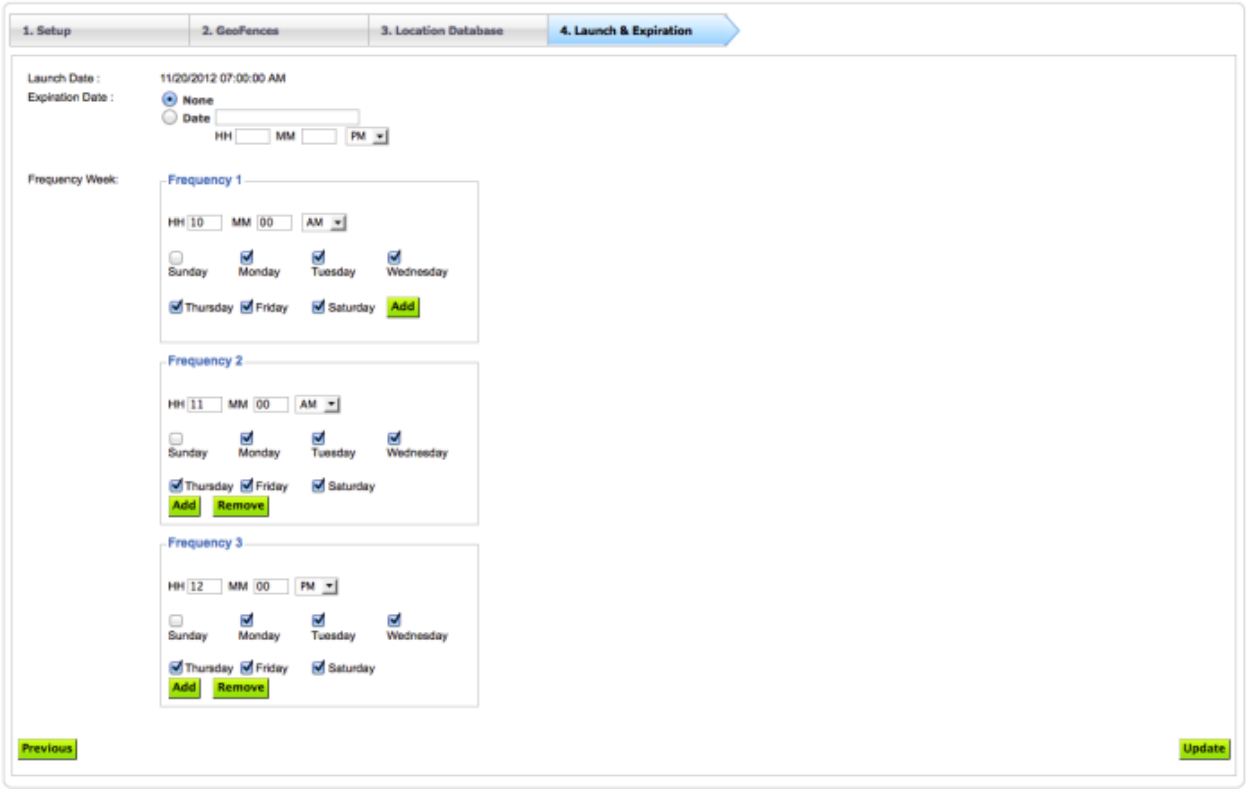
11. To delete a GeoFence, click the hand icon in the map toolbar and then click the **Delete Shape** button.
12. Click the **Next** button to move to the third tab, **Location Database**.



13. The **Location Ping Database** stores the records that *will* be pinged for their location. Using the **+** icons, choose the databases that you want to include in your **Location Pings Database**.

14. Optionally, choose which **Location Database(s)** you want to include. The **Location Database** stores the records that are positively pinged during the campaign. When the location pings database is pinged for locations, all positive (within fence) records during that ping will be stored there.

15. Click the **Next** button to move to the fourth tab, **Launch & Expiration**.



16. If you want to set an **Expiration Date** for the GeoFence campaign, choose the option for **Date** and then enter a value for the day and time (**HH**, **MM** and ***AM/PM***).

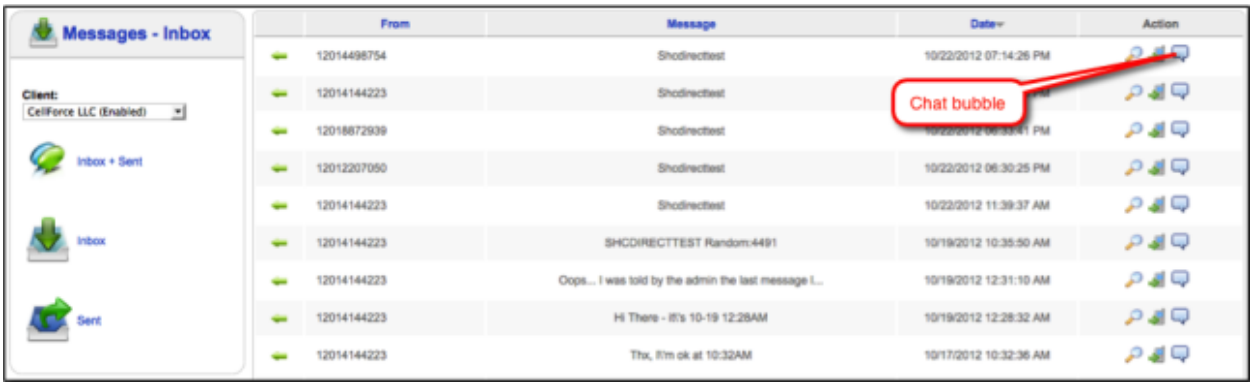
17. You may setup one or more distribution frequencies for your GeoFence campaign. When you set a specific time for the frequency, at that time the system will query the **Location Ping Database** for the location and then execute an instance of the campaign. For each frequency, choose the time and the day(s) of the week on which you want to execute this campaign. Here's an example: You want to ping the records location at 1pm on Monday, Wednesday and Friday. Also, I want to ping them at 2:00 PM, not 1:00 PM on Tuesday and Thursday. So, in the **Frequency** section you configure 2 frequencies: set **Frequency 1** to 1:00 PM on Monday, Wednesday, and Friday; set **Frequency 2** to 2:00 PM on Tuesday and Thursday.

18. Click the **Update** button to save your changes and initiate the campaign.

Msg Box

This especially useful new feature gives you the ability for to maintain one or more chat sessions between the system and a mobile phone user(s). You can respond immediately by starting a chat conversation after a user sends an MO for maximum interactions or customer support.

It's easy to access this feature: simply choose **Msg Box** from the toolbar and a new page will appear-like the figure below. The large section on the right side may already contain a listing of messages. You'll see four columns: **From/To**, **Message**, **Date**, and **Action**. On the left side, you can select the **Client** and choose the filters you want to apply to the message listing. In the bottom left corner, you'll find the **Active Chats** section.



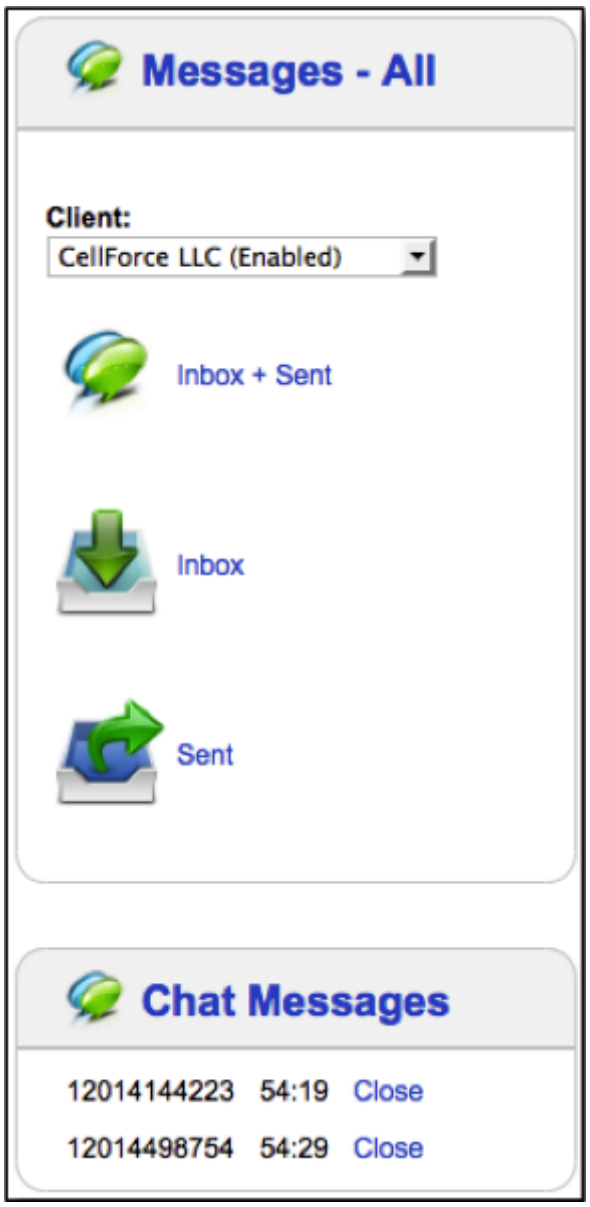
Follow these steps to engage in a chat session:

1. Locate the message in the listing, and then click the small blue chat bubble in the **Action** column
2. A pop-up chat window will appear, in which you will see the area to type, time remaining for that chat session, character count and the option to increase or decrease the time. Here is what a chat window looks like:

3. Enter the text you want to send to the recipient.
4. Respond to any messages that you receive.

Managing different chat sessions

You can have multiple chat sessions active simultaneously. Minimize the windows when they are not in use to keep the all the chat sessions clearly in view. Select **Open** to begin chatting again. Click **Close** to terminate a chat session.


Messages - All
Client:
CellForce LLC (Enabled)
Inbox + Sent
Inbox
Sent
Chat Messages
12014144223 54:19 Close
12014498754 54:29 Close

Email

Textboom offers you a way to send and track email:

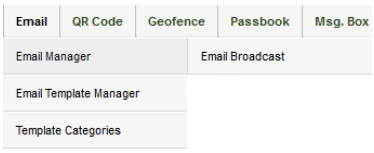
- Email Broadcast
- Email Manager
- Email Template Manager
- Email Template Wizard
- Email Log

You may access these tools from the **Email** menu in the **Textboom** toolbar or from the Email quick link icon located under the toolbar on the Dashboard.

Email Broadcast

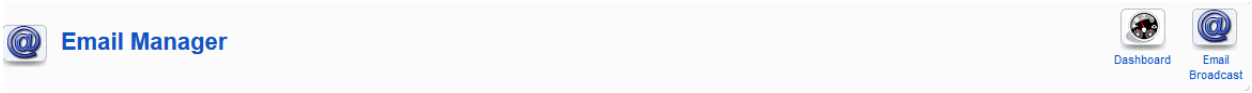
The **Email Broadcast** feature makes it easy for you to create one-time email distributions. We provide you with many options, and yet it's quite easy to setup.

You may access this feature by choosing **Email > Email Manager > Email Broadcast** from the toolbar

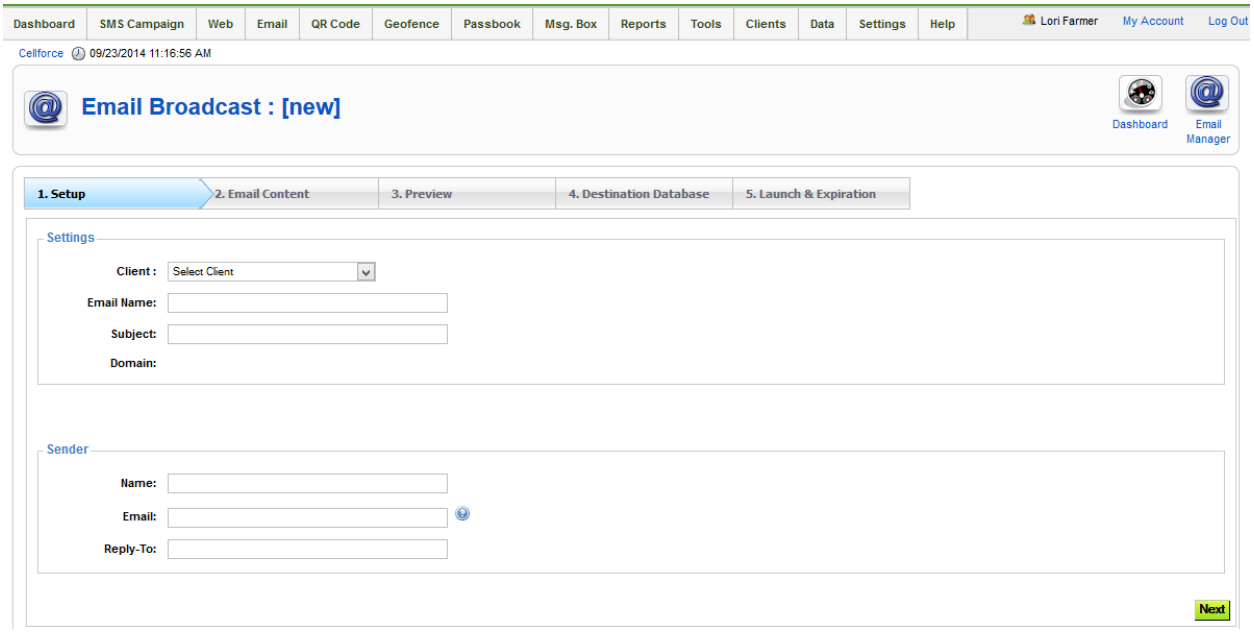


If you use the quick link Email icon located under the tool bar on the Dashboard it will take you to the **Email Manager**.

Click on the **Email Broadcast** icon in the top right corner to start a new Broadcast mail.



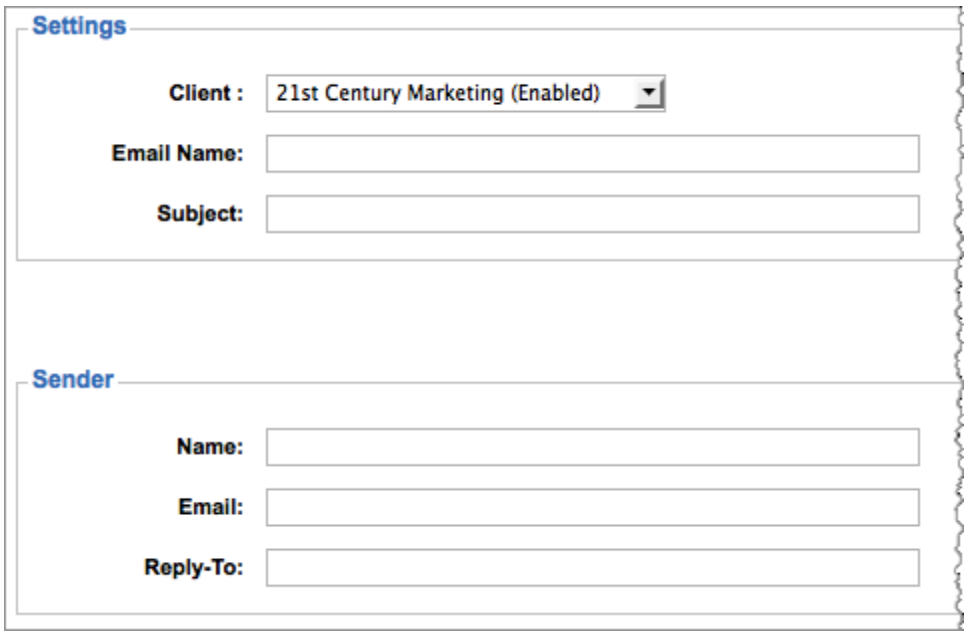
After choosing this menu item, you will see a page much like the figure below.



Setup

There are a number of steps necessary for configuring the email campaign. Start by editing the **Setup** page:

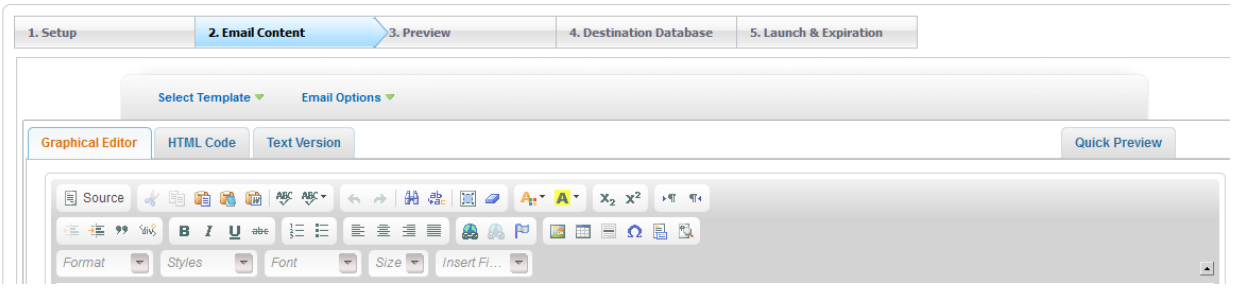
1. Click the **Client** drop-down list, and then select the correct client name.
2. Enter an **Email Name**, such as "Welcome Email" that will uniquely identify this email profile.
3. Enter a **Subject**, which will appear in the header of each email message. An example might be "Welcome to the club!"
4. Optionally, enter the **Name** that will appear in the email header.
5. You may also enter an **Email** address. This address will appear in the [From] field of the email header in each message.
6. The **Reply-To** address will be the same as the **Email** address, but you may change it to a different address. This address will appear in the [Reply-To] field of the email header.



7. When you're happy with the setup, click **Next** to move on to the **Email Content** step.

Email Content

In this step, you'll write the email message body and perhaps configure some options. First, have a look at the various features on this page:

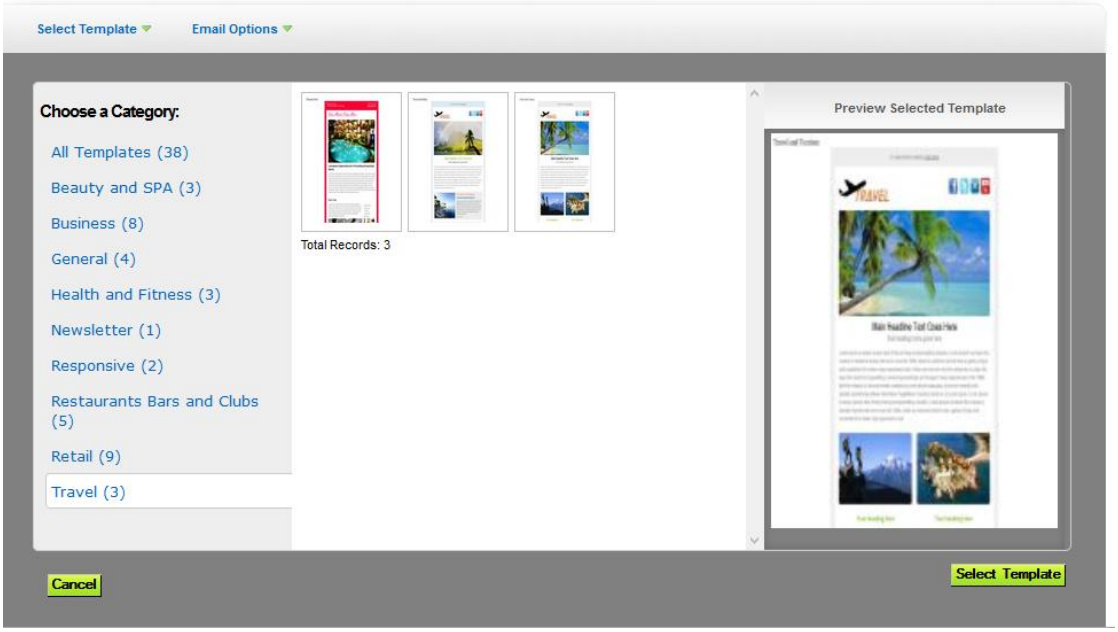


At the top of the page, you'll find the **Select Template** and **Email Options** drop-down menus. Just below these, you'll also notice several tabs for the **Graphical Editor**, **HTML Code**, **Text Version**, and **Quick Preview** (on the far right). We explain each of these below.

Select an Email Template

At the top of the page, click the **Select Template** drop menu. In the listing that appears, you can choose a category. Each category has a variety of email templates, any one of which you can

choose to format your email message. Click on a template to preview to the right. When you find one that you like, click the **Select Template** button.

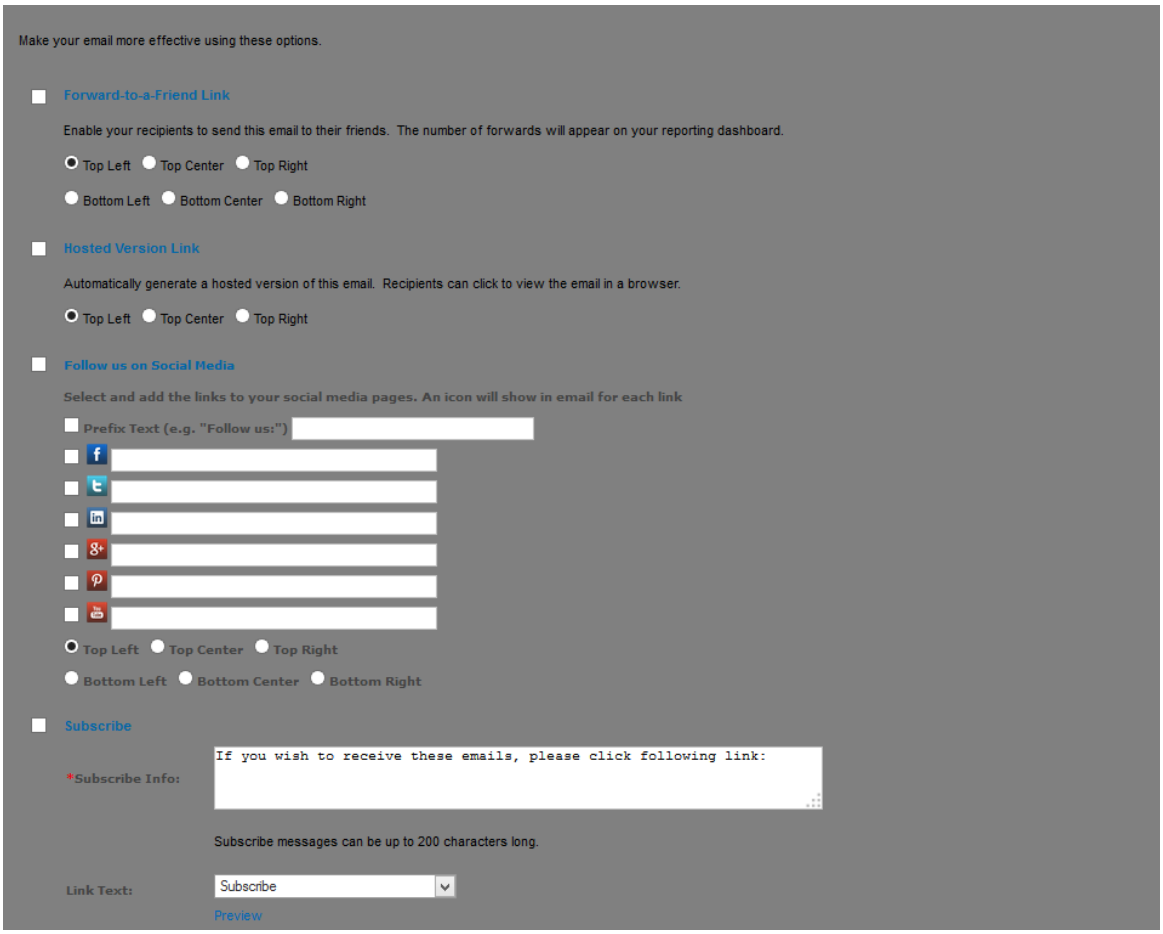


A **Responsive Template** is a template design that adapts itself to whatever is being used to view it. In theory the email, looks as good on a wall-sized super-HDTV as it does on your iPhone, and offers similar functionality.

After choosing a template, you can add, adjust, or remove some of the templates items and wording in the **Graphical Editor** (see below).

Email Options

Also at the top of the page, you can click the **Email Options** drop-down to view and configure several convenient options, and the location in your email.


Make your email more effective using these options.
Forward-to-a-Friend Link
Enable your recipients to send this email to their friends. The number of forwards will appear on your reporting dashboard.
Top Left Top Center Top Right
Bottom Left Bottom Center Bottom Right
Hosted Version Link
Automatically generate a hosted version of this email. Recipients can click to view the email in a browser.
Top Left Top Center Top Right
Follow us on Social Media
Select and add the links to your social media pages. An icon will show in email for each link
Prefix Text (e.g. "Follow us:")
Top Left Top Center Top Right
Bottom Left Bottom Center Bottom Right
Subscribe
*Subscribe Info:
If you wish to receive these emails, please click following link:
Subscribe messages can be up to 200 characters long.
Link Text:
Subscribe
Preview

- **Forward-to-a-friend link** - check this box to insert a link that your recipients may click to send this email to their friends. The number of forwards will appear in the Email Manager and Email Log (more on this below). Check the location box. This will display where in your email you want this link located. The default setting is for the link to show in the top left of your email.

- **Hosted Version Link** - check this box to insert a link that your recipients may click to view the message in on a HTML page within a web browser. Check the location box. This will display where in your email you want this link located. The default setting is for the link to show in the top left of your email.
- **Follow up on Social Media** - check this box to allow your email recipients to share this email on Facebook, Twitter, InstaGram, Google Plus, Pintrest and YouTube. Click on the social media link you want to appear in your email and insert your personalized link. You can choose as many links as you want.

You can also insert a prefix (i.e. “Follow Me”) that will appear before the selected social media link(s). Check the location box where in your email you want this/these link(s) located. It will default to show in the top left of your email.

- **Subscribe** – check this box if you want a **Subscribe** link for simple instructions to appear in your email. Users can use this link to sign up and receive your future emails. Should a user click this option and submit their information, the user will be added to your chosen database.

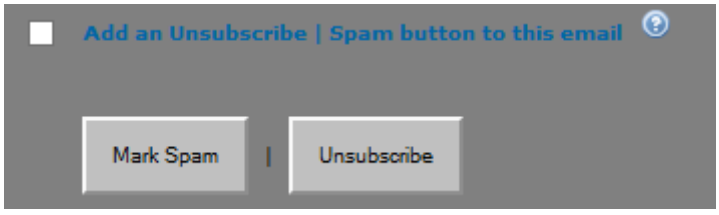
By default, a standard message will appear but you can tailor the **Subscribe** verbiage up to 200 characters long. Utilize the **Link Text** drop down menu and change the working. Check the location box. This will display where in your email you want this link located. The default setting is for the link to show in the bottom left of your email.

- **Unsubscribe** - check this box if you want an **Unsubscribe** to appear in your email. Users can use this link to stop receiving your future emails. Should a user click this option and submit their information, they will be opt-ed out of your chosen database.

By default, a standard messages will appear but you can tailor the **Unsubscribe** verbiage up to 200 characters long. Utilize the **Link Text** drop down menu and change the working of the link. Check the location box. This will display where in your email you want this link located. The default setting is for the link to show in the bottom left of your email.

- **Company Details** – If this button is enabled, company details will show in your email. You can edit the **Company Name**, **Address**, and other location information. Choose the location of the link and how you want the company information to appear. When you are happy with the changes, click Done. If you are not happy with the preview, click on Change.

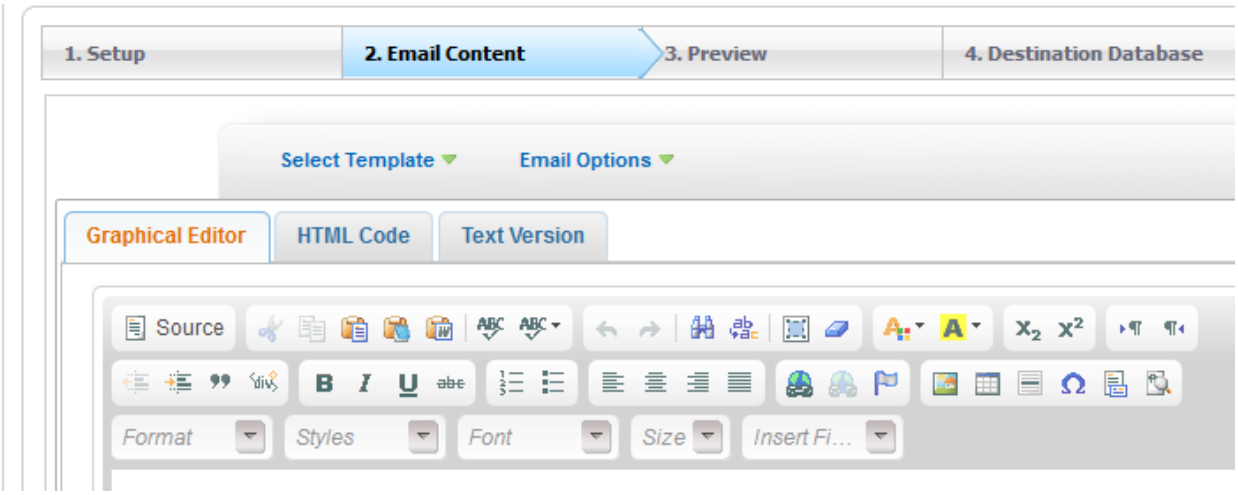
- **Add an Unsubscribe / Spam button to this email –** When you click on this option, a quick link button will appear for users to unsubscribe to your emails.



The user that clicks on this button will be directed to the **Unsubscribe** option on this system. It is better for the deliverability of your future campaigns if the user unsubscribe from your list. This option does not prevent the user from clicking on the “This is a spam” option on their email client.

Graphical Editor

The graphical editor is visible when you first enter the **Email Content** step. You enter text in the large, white area. Immediately above, you can see a number of toolbars. Here you will find many of the essential tools that are available in a typical word processor. Explore these tools by hovering your mouse over each one for a brief moment to display a tooltip which describes the function of the tool. You can find tools to cut/cut/paste test, perform a spell-check, highlight text, align text, insert links and graphics, and more.



HTML Code

After you have written some of your message, you can click the **HTML Code** tab to view the code which lies beneath. You can highlight this code and copy it so that you might paste it into a web page elsewhere.

Text Version

You can view a simple-text version of your message by clicking this tab. You can copy some or all of the text and then paste it into another text editor.

Quick Preview

You can click the **Quick Preview** tab to view the email as it will appear to your recipients. Click the **Graphical Editor** tab to return to the editor and make additional changes.

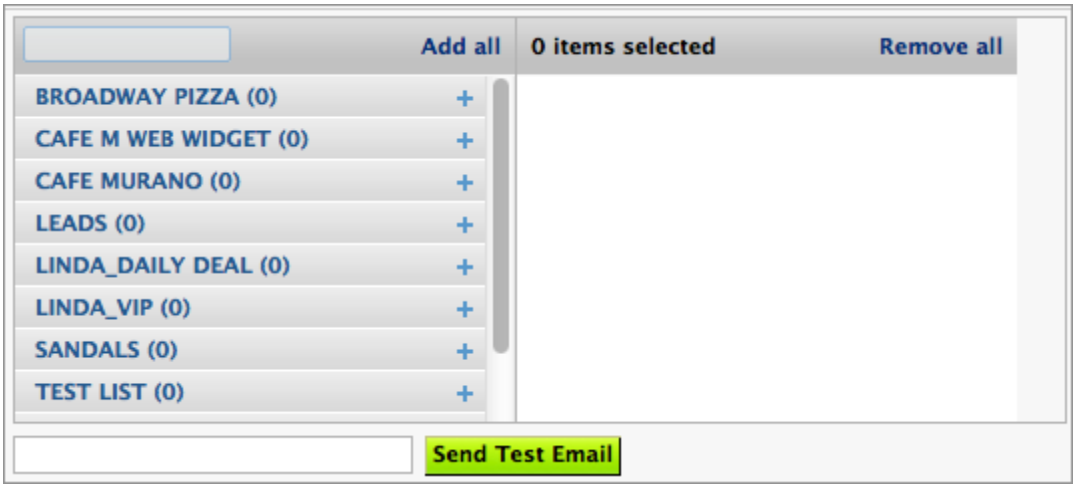
Click the **Next** button to move on to the **Preview** step.

Preview

In this page, you can see the email message as it will appear to your recipients - in its entirety. Click the **Previous** button to return to the **Email Content** step and make any changes. If you're happy with the email format and content, click the Next button to move on to the **Destination Database** step.

Destination Database

Here you can select one or more databases of recipients to which you will distribute your email message.



Follow these simple steps:

1. For each database that you want to include, click the plus (+) sign for that database to move it to the right column. Click **Add All** if you want to send the email to all of the recipients
2. If necessary, you can remove any databases you add by clicking the minus (-) sign for that database. Click **Remove All** to remove all databases.

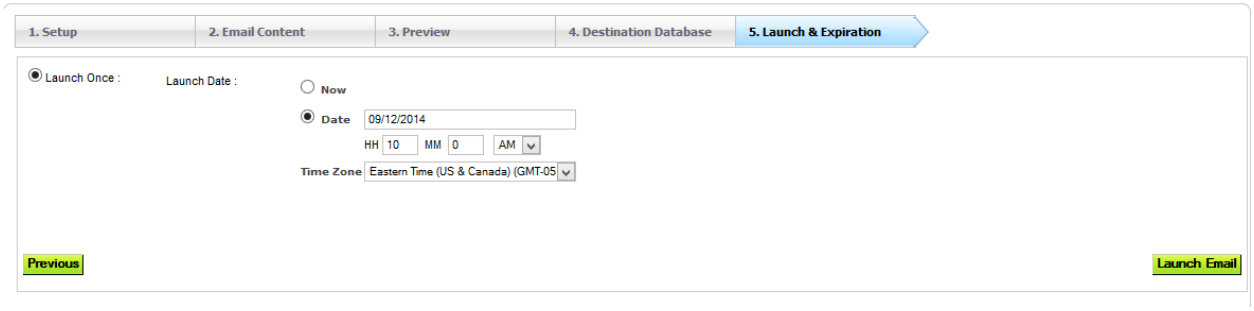
   You can also mouse over the name of the database you want to select and when it is highlighted, double click. This will work to select a database, or if necessary remove one.
3. Click **Send Test Email** if you want to send a test message to a specific email address.
4. Click **Next** to go on to the last step, **Launch & Expiration**.

Launch & Expiration

This is the last step, you specify if you want to launch the email distribution one time (Launch Once), or repeat the distribution at regular intervals (Recurrence). After you make your decision, follow the simple steps below.

Launch Once

1. The default **Launch Date** is today (immediately), as shown by the selection of the **Now** radio button.
2. If you want to specify a future launch date, click the **Date** radio button.
3. Click in the field to display a calendar, then select a date on which the distribution will begin.
4. Enter the time in hours (**HH**) and minutes (**MM**), and choose ***AM*** or ***PM*** from the drop-down list.
5. Choose a **Time Zone**.



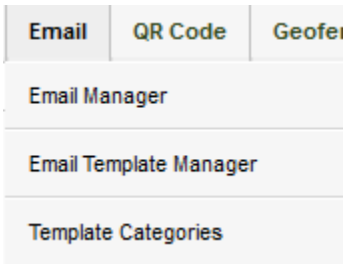
You may click the **Previous** button to return to prior steps and make adjustments. If you're happy with all of the settings, click **Launch Email** to commit your changes and return to the main page.

Email Manager

The **Email Manager** displays a listing of all email campaigns for your account. You can filter by ***OC (Operating Company)***, ***Agency***, ***Client***, **Status**. You can edit, disable, re-enable, and delete campaigns.

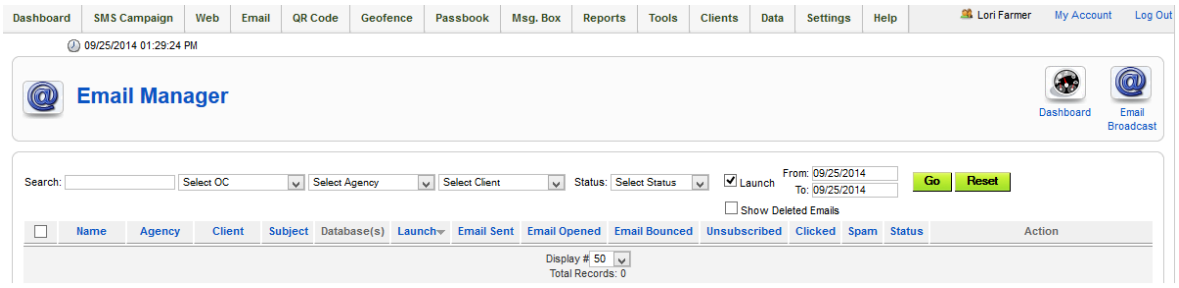
There are also options to restrict the date range, display previously deleted campaigns, and perform a search for a specific word or number. The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time.

You may access this feature by choosing **Email > Email Manager** from the toolbar

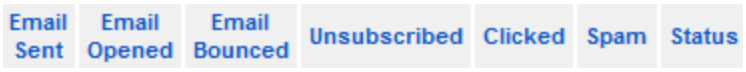


or quick link email icons located under the toolbar on the Dashboard.

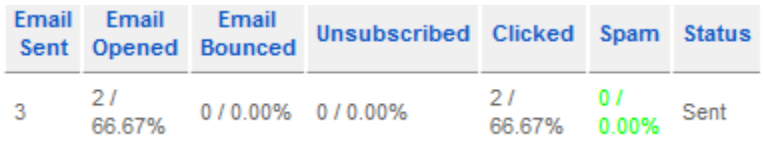
After choosing this menu item, you'll see a page having the characteristics which we describe below.



The Email Manager will show you a tally of all the actions from each recipient of the email.



Email actions are: Email Sent, Email Opened, Email Bounced, Unsubscribed, Clicked, Spam and Status. The email action results will change as the recipients' read the email, forward, click on the links or any action is preformed that is embedded within the email.

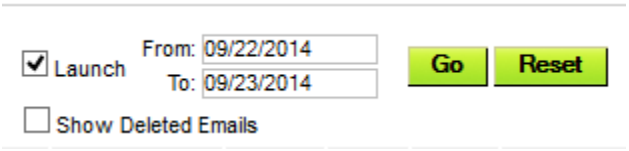


Filters

On the left side of the report control panel, you'll find a group of filters (below). Choose from one or more of these drop-down menus to filter by ***OC (Operating Company)***, ***Agency***, or ***Client***), **Status**, or ***Campaign Type***.

Along with these filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.

On the right side of the control panel, you may uncheck the box for **Launch** if you also want to see campaigns that have expired. Check the **Show Deleted Emails** checkbox if you want to display campaigns that had been previously deleted.



Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Restrict by Date Range

On the right side of the report control panel, you may find the **From** and **To** of date filters (see the figure above). Follow these steps to limit the records in the listing to only those that fall within a date range:

1. Click the **From** calendar icon (for example, enter 9/22/2014).
2. Next, click the **To** calendar icon (you might enter 9/23/2014).
3. Click the **Go** button to update the listing. Only the records that fall within the date range will appear in the results.
4. Click the **Reset** button to revert back to the original filter settings.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will find all of the email campaigns.

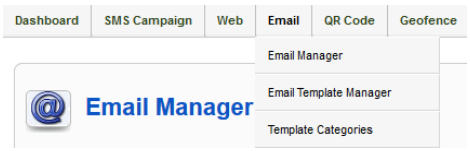
Managing Campaigns

At the extreme right end of each record in the listing you'll find a series of small icons:

Click this icon to view a popup showing the email message dialogue.
Click this icon to edit the email (you will exit the Email Manager).
Click this icon to cause the email to expire immediately. An email that you expire will no longer send messages.
Click this icon to disable the campaign. A disabled email cannot be used again until it is enabled.
Click this icon to delete a campaign. A deleted email is both disabled and invisible except when the **Show Deleted SMS Email** box has a check in it.

Email Template Manager

The **Email Template Manager** displays a listing of all email templates for your account. You may access this feature by choosing **Email > Email Template Manager** from the toolbar



You can filter by ***OC (Operating Company)***, ***Agency***, ***Client***, **Status**. You can edit, disable, re-enable, and delete templates.

You can also perform a search for a specific word or number. The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time.

After choosing this menu item, you'll see a page having the characteristics which we describe below.

Managing Templates

At the extreme right end of each record in the listing you'll find a series of small icons:

- Click this icon to edit the template (you will exit the Template Manager).
- Click this icon to enable a template that was previously disabled.
- Click this icon to delete the template. A deleted template is both disabled and invisible.

Filters

On the left side of the report control panel, you'll find a group of filters (below). Choose from one or more of these drop-down menus to filter by ***OC (Operating Company)***, ***Agency***, or ***Client***), or **Status**.

Along with these filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.

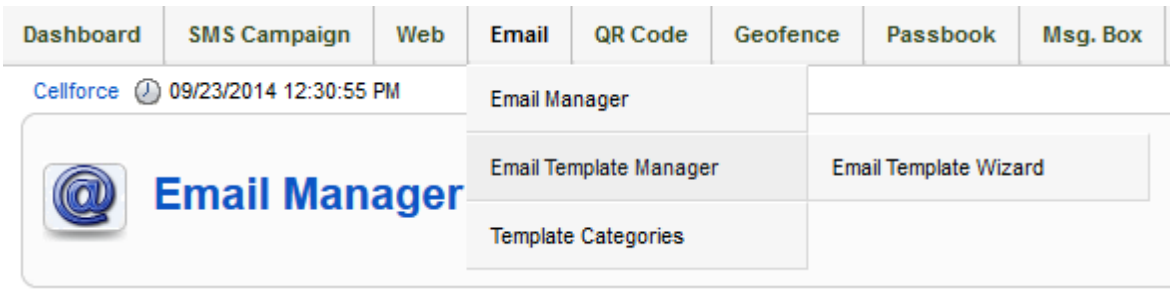
Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Column Headings

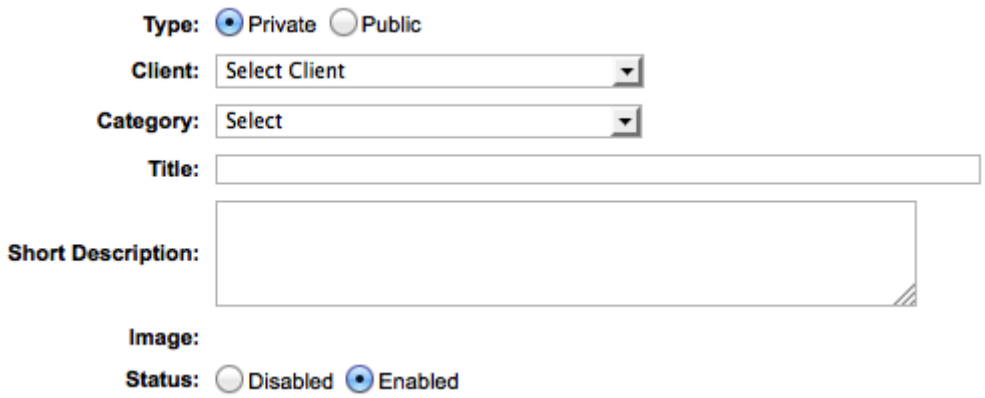
The figure below displays the first few column headings. Underneath these headings, you will find all of the email templates.

Email Template Wizard

To make it easier to create different types of email messages, you can create one or more templates. You may access this feature by choosing **Email > Email Manager > Email Template Wizard** from the toolbar.



After choosing this menu item, you will see a page much like the figure below (top of the page):



Follow these steps to create an email template:

1. Choose whether you want this to be a **Private** or **Public** template. If you choose **Public**, the template will be applicable to all clients (and the Client drop-down list will become unavailable).
2. If you are creating a **Private** template, then you may choose a **Client** from the drop-down listing.

3. From the **Category** drop-down listing, choose the type of template (such as ***Restaurant*** or ***Retail***).
4. Give the template a **Title** and **Description**, which will appear in the template listing in the Email Template Manager.
5. If you want the template to be initially unavailable, then set the **Status** to ***Disabled***. You can enable it later in the Email Template Manager.
6. Using the graphical editor, edit the **Email Template**. See the Email Broadcast topic to learn more about the **Graphical Editor**, **HTML Code**, **Text Version** and **Preview** tabs.
7. By default, the text in the **Unsubscribe info** field contains instructions for a simple cancellation of the subscription. You can choose different instructions by selecting one of the options from the **Link Text** drop-down menu. To insert the text in the **Unsubscribe info** field into the bottom of your email message, click the Done link.
8. You can also edit the **Company Name**, **Address**, and other location information. When you are happy with the changes, click the Done link to insert these elements into the bottom of the email message.
9. You can click the **Quick Preview** tab to view the email as it will appear to your recipients. Click the **Graphical Editor** tab to return to the editor and make additional changes.
10. When you're happy with the template settings, click **Save** in the upper right corner of the page.

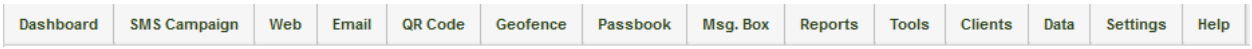
After you successfully save a new template, you may then find it in the Email Template Manager listing.

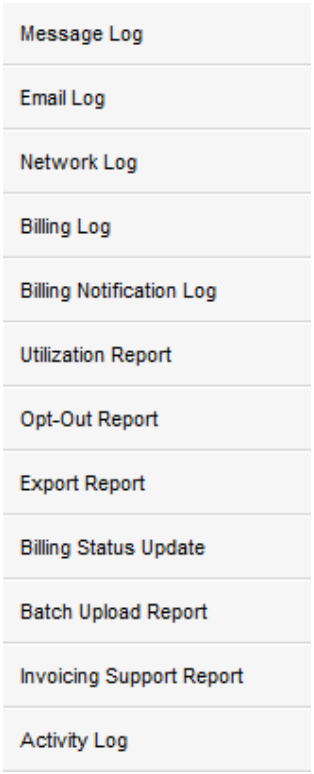
Reports

Textboom offers you several types of reports:

- Message Log
- Email Log
- Network Log
- Batch Upload Report
- Invoicing Support Report
- Opt-Out Report
- SMS Campaign Performance Report
- Utilization Report
- Log

You may access these tools from the **Reports** menu in the **Textboom** toolbar.



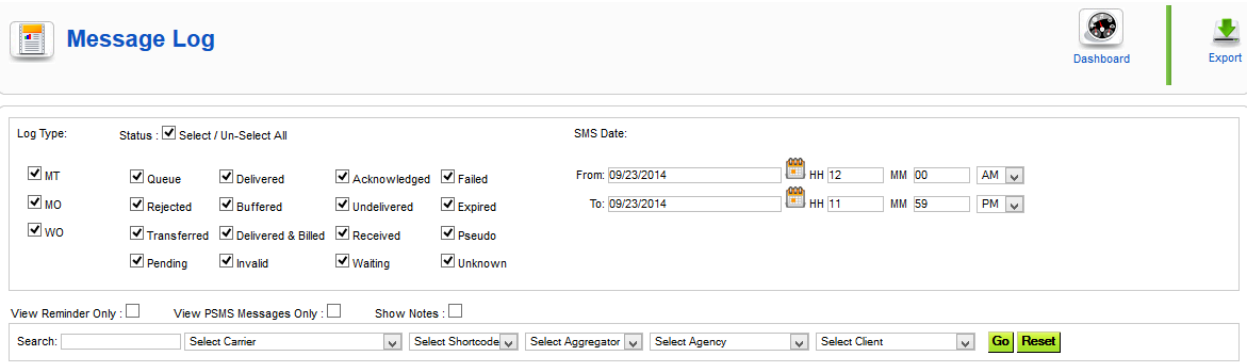


Message Log

The Message Log reporting feature displays a listing of all SMS messages. You can filter for successful distributions, unsuccessful attempts, or exclude specific log types and status indicators from the report. There is also an option to restrict the date range. You can also search for a specific term, such as a number or a word. Or, you can choose from several value-specific filters such ***Select Carrier***, ***Select Shortcode***, ***Select Agency***, or ***Select Client***.

The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time. Once you have the results that you seek, you can export the data to a comma-separated value (CSV) text file. Read below to learn how to prepare your report.

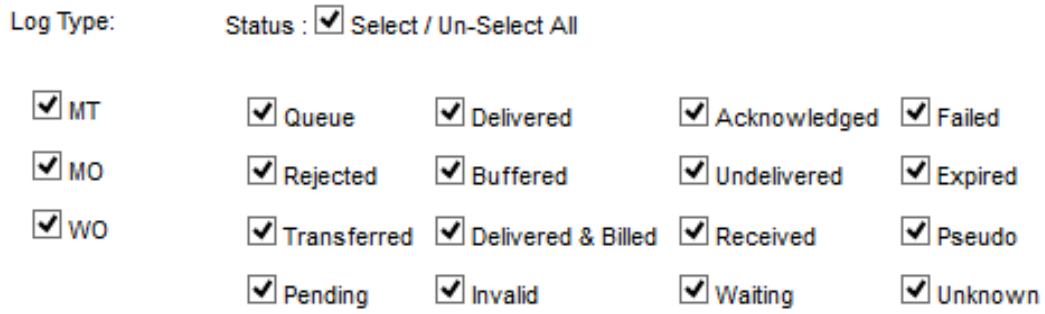
You may access this feature by choosing **Reports > Message Log** from the toolbar.



After choosing this menu item, you will see a page having the characteristics which we describe below.

Filters

On the left side of the report control panel, you'll find a group of filters:



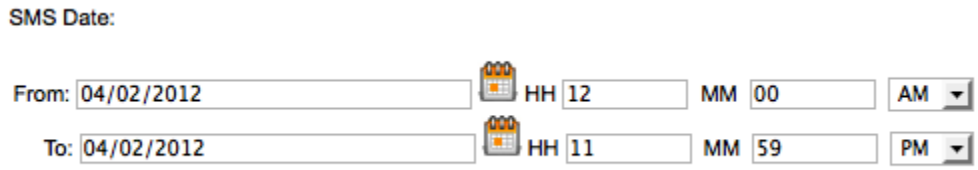
Initially, all of these options have a checkmark - which means that all records having these attributes will appear in the results. Please find the definition of each below:

- **MT - Message Terminated**: Message sent from the platform to subscribers cell phones.
- **MO - Message Originated**: Messages sent from cell phones to the platform.
- **WO - Widget Originated**: Messages generated from the web widget.

As you can see, there are many **Status** types. These correspond to the values that are found in the **Status** column in the listing. Unchecking a **Status** box will cause that status value to filter out of the listing. For example, unchecking all **Status** boxes except for ***Pending*** will change the listing to display on those records having a **Status** of ***Pending***. Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Restrict by Date Range

On the right side of the report control panel, you find the **SMS Date** section:



Here you can choose a beginning (**From**) and ending (**To**) of date range that will restrict the records that appear in the results.

1. Click the **From** calendar icon (for example, choose April 1).
2. Then, optionally, choose the hour (**HH**) and minutes (**MM**) that will define the precise time for the start of the report date range. Also choose ***AM*** or ***PM*** from the drop-down. You could enter 9:00 AM.
3. Next, click the **To** calendar icon (you might choose April 30).
4. Then, optionally, choose the hour (**HH**) and minutes (**MM**) that will define the precise time for the start of the report date range. You could enter 5:00 PM.
5. Click the **Go** button to update the listing. Only the records that fall within the date range will appear in the results.
6. Click the **Reset** button to revert back to the original filter settings.

Search

Immediately above the column headings, you'll find a **Search** field (see the figure below). Here you can enter a specific value, such as "Chicago" or "15615551313".

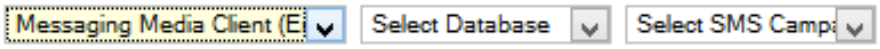
Click the **Go** button to initiate the search. Any records containing the value in the **Search** field will appear in the results.

Other filters

To the right of the **Search** field, you'll find a number of other filters: ***Select Carrier***, ***Select Shortcode***, ***Select Agency***, or ***Select Client***. You can choose values in one or more of these drop-down menus to further restrict the report listing.

Click the **Go** button to initiate the search. Any records containing the value in the **Search** field will appear in the results.

As you choose drop down menus, other will appear that will continue to restrict the report. As seen below, when you select a Client from the drop down menu, the Database and SMS Campaign filter will appear.



Exporting

Once you have the results that you seek, you can export the data to a comma-separated value (CSV) text file. You can easily export the listing by following these simple steps:

1. Click the **Export** icon in the upper right corner of the page.

2. When the window appears, choose the location in which you want to save the CSV file.
3. Click **Save**.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see all of the messages.

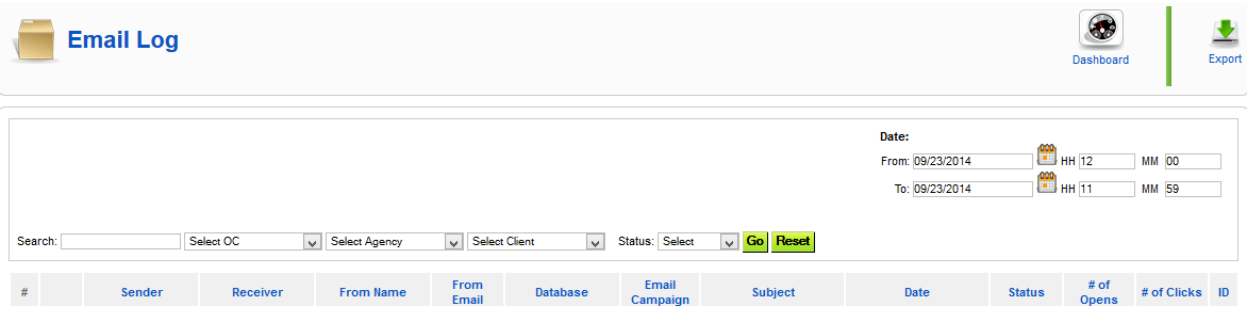
Email Log

The Email Log reporting feature displays a listing of all Email messages that were sent. You can filter for successful distributions, unsuccessful attempts, or exclude specific types and status indicators from the report. There is also an option to restrict the date range. You can also search for a specific term, such as a number or a word. Or, you can choose from several value-specific filters such ***Select Carrier***, ***Select Short code***, ***Select Agency***, or ***Select Client***.

The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time. Once you have the results that you seek, you can export the data to a comma-separated value (CSV) text file. Read below to learn how to prepare your report.

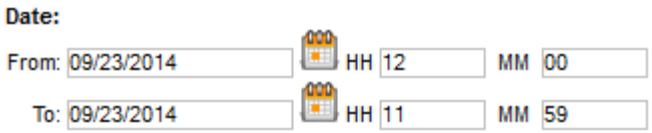
You may access this feature by choosing **Reports > Email Log** from the toolbar.

After choosing this menu item, you will see a page having the characteristics which we describe below.



Restrict by Date Range

On the right side of the report control panel, you find the **Date** section:



Here you can choose a beginning (**From**) and ending (**To**) of date range that will restrict the records that appear in the results.

1. Click the **From** calendar icon (for example, choose April 1).
2. Then, optionally, choose the hour (**HH**) and minutes (**MM**) that will define the precise time for the start of the report date range. Also choose ***AM*** or ***PM*** from the drop-down. You could enter 9:00 AM.
3. Next, click the **To** calendar icon (you might choose April 30).
4. Then, optionally, choose the hour (**HH**) and minutes (**MM**) that will define the precise time for the start of the report date range. You could enter 5:00 PM.
5. Click the **Go** button to update the listing. Only the records that fall within the date range will appear in the results.
6. Click the **Reset** button to revert back to the original filter settings.

Search

Immediately above the column headings, you'll find a **Search** field (see the figure below). Here you can enter a specific value, such as "Chicago" or "15615551313".

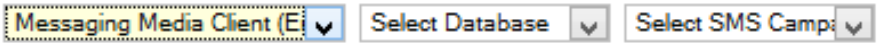
Click the **Go** button to initiate the search. Any records containing the value in the **Search** field will appear in the results.

Other filters

To the right of the **Search** field, you'll find a number of other filters: ***Select Carrier***, ***Select Shortcode***, ***Select Agency***, or ***Select Client***. You can choose values in one or more of these drop-down menus to further restrict the report listing.

Click the **Go** button to initiate the search. Any records containing the value in the **Search** field will appear in the results.

As you choose drop down menus, other will appear that will continue to restrict the report. As seen below, when you select a Client from the drop down menu, the Database and SMS Campaign filter will appear.



Exporting

Once you have the results that you seek, you can export the data to a comma-separated value (CSV) text file. You can easily export the listing by following these simple steps:

1. Click the **Export** icon in the upper right corner of the page.

2. When the window appears, choose the location in which you want to save the CSV file.
3. Click **Save**.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see all of the messages.

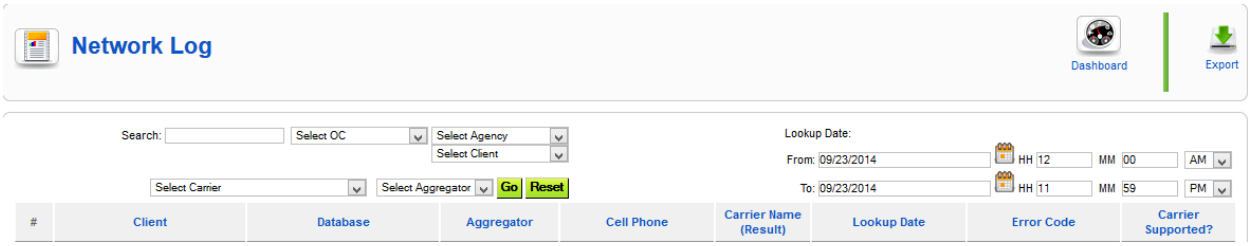
Sender	Receiver	From Name	From Email	Database	Email Campaign

Network Log

The Network Log reporting feature displays a listing of all Network Look Up that were preformed. You can filter the report, if need be. There is also an option to restrict the date range. You can also search for a specific term, such as a number or a word. Or, you can choose from several value-specific filters such ***Select Carrier***, ***Select Shortcode***, ***Select Agency***, or ***Select Client***.

The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time. Once you have the results that you seek, you can export the data to a comma-separated value (CSV) text file. Read below to learn how to prepare your report.

You may access this feature by choosing **Reports > Network Log** from the toolbar. After choosing this menu item, you will see a page having the characteristics which we describe below.



Restrict by Date Range

On the right side of the report control panel, you find the **Look Up Date** section:

Here you can choose a beginning (**From**) and ending (**To**) of date range that will restrict the records that appear in the results.

1. Click the **From** calendar icon (for example, choose April 1).

2. Then, optionally, choose the hour (**HH**) and minutes (**MM**) that will define the precise time for the start of the report date range. Also choose ***AM*** or ***PM*** from the drop-down. You could enter 9:00 AM.
3. Next, click the **To** calendar icon (you might choose April 30).
4. Then, optionally, choose the hour (**HH**) and minutes (**MM**) that will define the precise time for the start of the report date range. You could enter 5:00 PM.
5. Click the **Go** button to update the listing. Only the records that fall within the date range will appear in the results.
6. Click the **Reset** button to revert back to the original filter settings.

Search

Immediately above the column headings, you'll find a **Search** field (see the figure below). Here you can enter a specific value, such as "Chicago" or "15615551313".

Click the **Go** button to initiate the search. Any records containing the value in the **Search** field will appear in the results.

Other filters

To the right of the **Search** field, you'll find a number of other filters: ***Select Carrier***, ***Select Shortcode***, ***Select Agency***, or ***Select Client***. You can choose values in one or more of these drop-down menus to further restrict the report listing.

Click the **Go** button to initiate the search. Any records containing the value in the **Search** field will appear in the results.

Exporting

Once you have the results that you seek, you can export the data to a comma-separated value (CSV) text file. You can easily export the listing by following these simple steps:

1. Click the **Export** icon in the upper right corner of the page.

2. When the window appears, choose the location in which you want to save the CSV file.
3. Click **Save**.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see all of the messages.

Batch Upload Report

The Batch Upload reporting feature displays a listing of CSV batches that have been uploaded for your account. You can filter by type ***OC (Operating Company)***, ***Agency***, or ***Client***. There is also an option to restrict the date range, and you may also search for a specific word or number.

The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time. Once you have the results that you seek, you can export the data to a comma-separated value (CSV) text file. Read below to learn how to prepare your report.

You may access this feature by choosing **Reports > Batch Upload Report** from the toolbar.

After choosing this menu item, you will see a page having the characteristics which we describe below.

Filters

On the left side of the report control panel, you'll find a group of filters (below). Choose from one or more of these drop-down menus to filter by ***OC (Operating Company)***, ***Agency***, or ***Client***).

Along with these filters, you'll find a **Search** field. Here you can enter a specific value, such as "Chicago" or "15615551313". Click the **Go** button to initiate the search. Any records containing the value in the **Search** field will appear in the results.

Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Restrict by Date Range

On the right side of the report control panel, you may find the **Select Date** section:

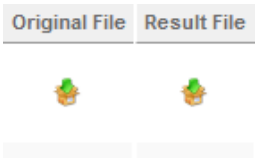
Here you can choose a beginning (**From**) and ending (**To**) of date range that will restrict the records that appear in the results.

1. Click the **From** calendar icon (for example, choose April 1).
2. Then, optionally, choose the hour (**HH**) and minutes (**MM**) that will define the precise time for the start of the report date range. Also choose ***AM*** or ***PM*** from the drop-down. You could enter 9:00 AM.
3. Next, click the **To** calendar icon (you might choose April 30).
4. Then, optionally, choose the hour (**HH**) and minutes (**MM**) that will define the precise time for the start of the report date range. You could enter 5:00 PM.
5. Click the **Go** button to update the listing. Only the records that fall within the date range will appear in the results.
6. Click the **Reset** button to revert back to the original filter settings.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see all of the batches.

Here you can also see the original file and result file of the batch upload. Both of these files can be downloaded to your computer – simply click on the box/green arrow and follow the prompts.

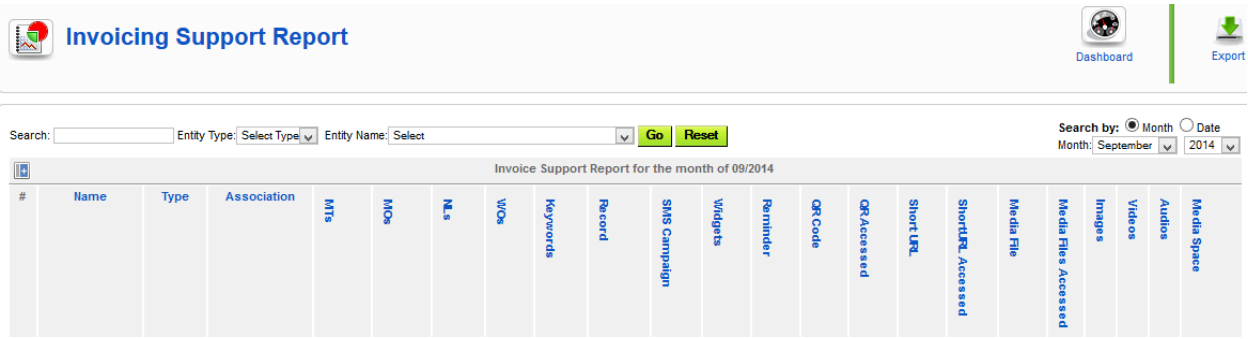


Invoicing Support Report

The Invoicing Support reporting feature displays a listing of potentially billable elements to assist you in with invoicing. You can filter by type (***OC (Operating Company)***, ***Agency***, or ***Client***) or **Entity Name**. You can also search for a specific word or number.

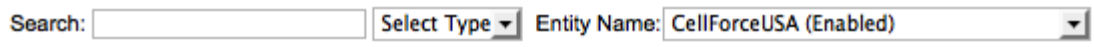
The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time. Once you have the results that you seek, you can export the data to a comma-separated value (CSV) text file. Read below to learn how to prepare your report.

You may access this feature by choosing **Reports > Invoicing Support Report** from the toolbar. After choosing this menu item, you will see a page having the characteristics which we describe below.



Filters

On the left side of the report control panel, you'll find a group of filters (below). Choose from one or more of these drop-down menus to filter by ***OC (Operating Company)***, ***Agency***, or ***Client***.



Along with these filters, you'll find a **Search** field. Here you can enter a specific value, such as "Chicago" or "5551313". Click the **Go** button to initiate the search. Any records containing the value in the **Search** field will appear in the results.

On the far right of the control panel, you may also change the **Month** and **Year**:

Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Exporting

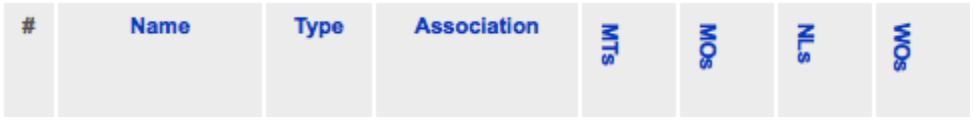
Once you have the results that you seek, you can export the data to a comma-separated value (CSV) text file. You can easily export the listing by following these simple steps:

1. Click the **Export** icon in the upper left corner of the page.

2. When the window appears, choose the location in which you want to save the CSV file.
3. Click **Save**.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see all of the billable elements.

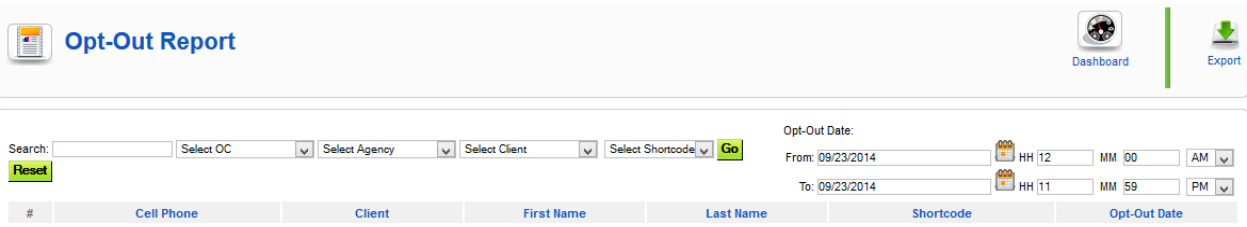


Opt-Out Report

The Opt-Out reporting feature displays a listing of all opt-out events. You can filter by type ***OC (Operating Company)***, ***Agency***, ***Client***, or **Short Code**. There is also an option to restrict the date range. You can also search for a specific word or number.

The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time. Once you have the results that you seek, you can export the data to a comma-separated value (CSV) text file. Read below to learn how to prepare your report.

You may access this feature by choosing **Reports > Opt-Out Report** from the toolbar. After choosing this menu item, you will see a page having the characteristics which we describe below.



Filters

On the left side of the report control panel, you'll find a group of filters (below). Choose from one or more of these drop-down menus to filter by ***OC (Operating Company)***, ***Agency***, ***Client***), or **Short Code**.

Along with these filters, you'll find a **Search** field. Here you can enter a specific value, such as "Chicago" or "5551313". Click the **Go** button to initiate the search. Any records containing the value in the **Search** field will appear in the results.

Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Restrict by Date Range

On the right side of the report control panel, you may find the **Opt-Out Date** section:

Here you can choose a beginning (**From**) and ending (**To**) of date range that will restrict the records that appear in the results.

1. Click the **From** calendar icon (for example, choose April 1).
2. Then, optionally, choose the hour (**HH**) and minutes (**MM**) that will define the precise time for the start of the report date range. Also choose ***AM*** or ***PM*** from the drop-down. You could enter 9:00 AM.
3. Next, click the **To** calendar icon (you might choose April 30).
4. Then, optionally, choose the hour (**HH**) and minutes (**MM**) that will define the precise time for the start of the report date range. You could enter 5:00 PM.
5. Click the **Go** button to update the listing. Only the records that fall within the date range will appear in the results.
6. Click the **Reset** button to revert back to the original filter settings.

Exporting

Once you have the results that you seek, you can export the data to a comma-separated value (CSV) text file. You can easily export the listing by following these simple steps:

1. Click the **Export** icon in the upper left corner of the page.

2. When the window appears, choose the location in which you want to save the CSV file.
3. Click **Save**.

Column Headings

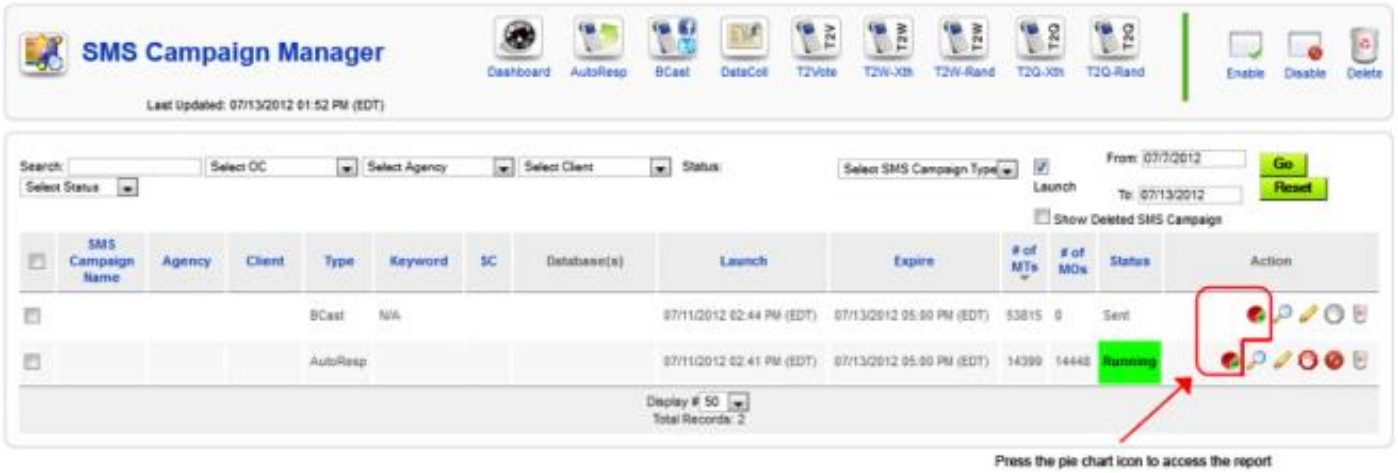
The figure below displays the first few column headings. Underneath these headings, you will see all of the opt-out events.

SMS Campaign Performance Report

What is SMS Campaign Performance Report?

The **SMS Campaign Performance Report** gives the user the ability to track, analyze and review campaign performances with this easy-to-use feature via detailed graphs and easy-to-read detailed data sheets.

How to access your report:

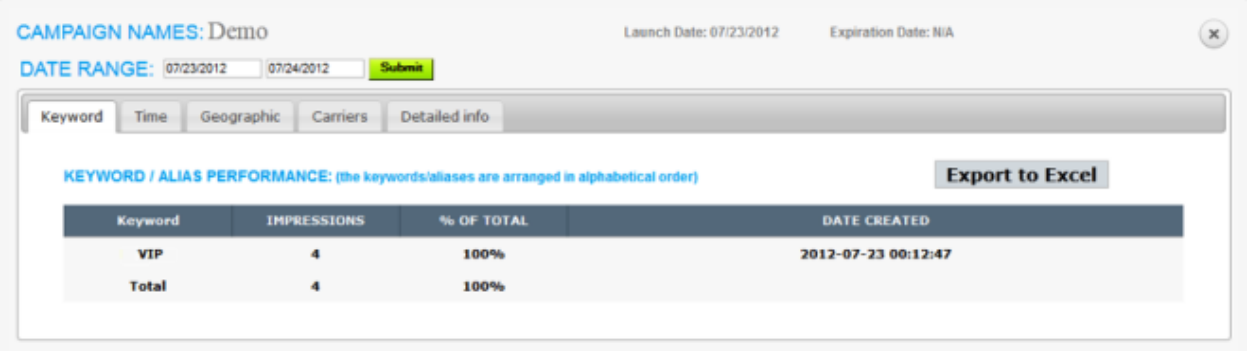


What data is available?

All campaigns, other than Broadcast campaigns, will show a report including tabs: Keyword, Time, Geographic, Carriers and Detailed info.

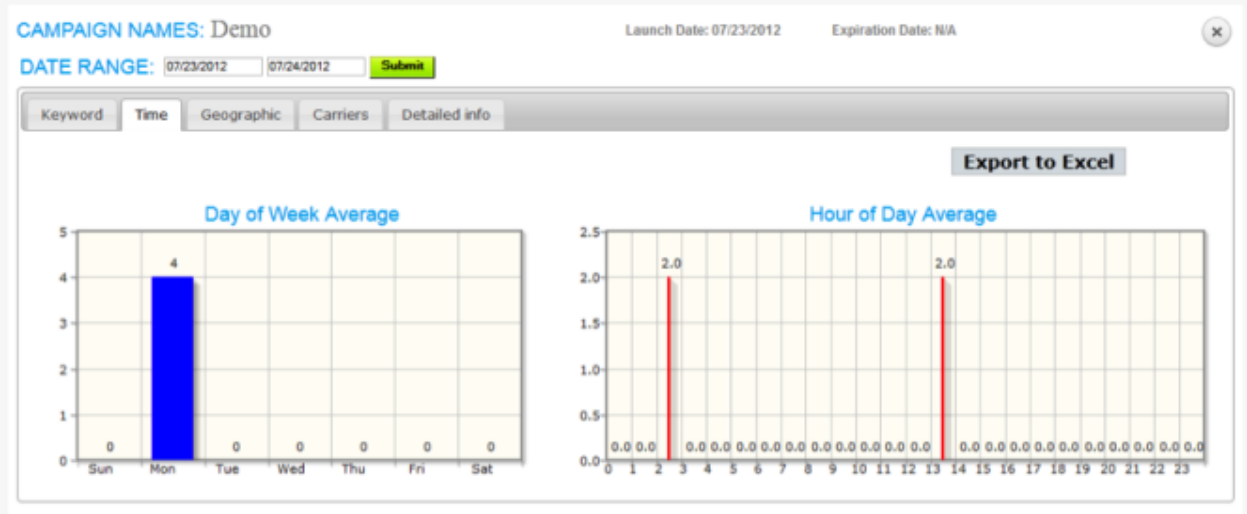
> **Note**: The SMS Campaign Report is updated hourly. Please allow 1 hour for the most up-to-date results.

The **Keyword** tab displays the keyword and aliases defined in the campaign, impressions (or interactions) from each one and the creation dates.

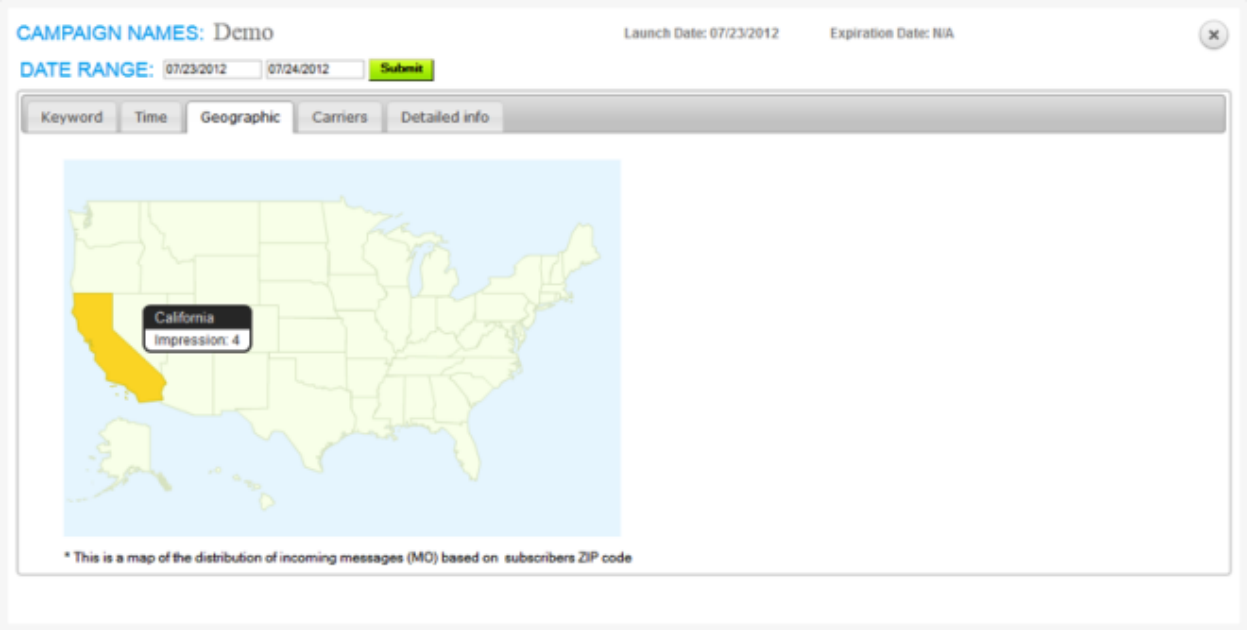


The **Time** tab displays the time distribution of the campaign. **The Day of Week Average** chart reflects the average campaign interaction for each day. The **Hour of Day Average** chart shows the average campaign interaction per hour.

Note: The results depict the avg. values based on the total impressions in the Date Range



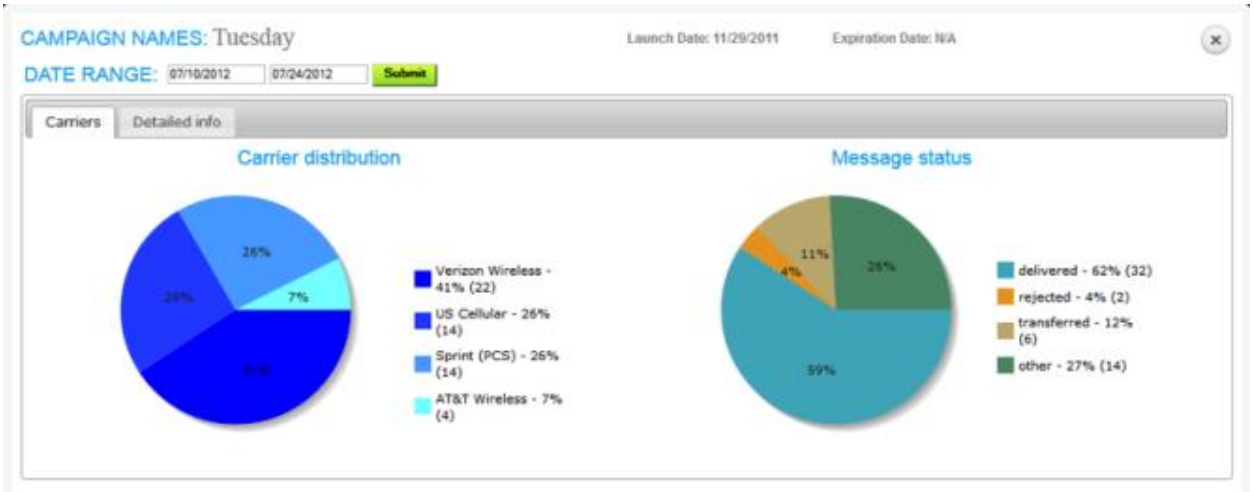
The **Geographic** tab shows the location of records as they opt in (MO) based on their zip code.



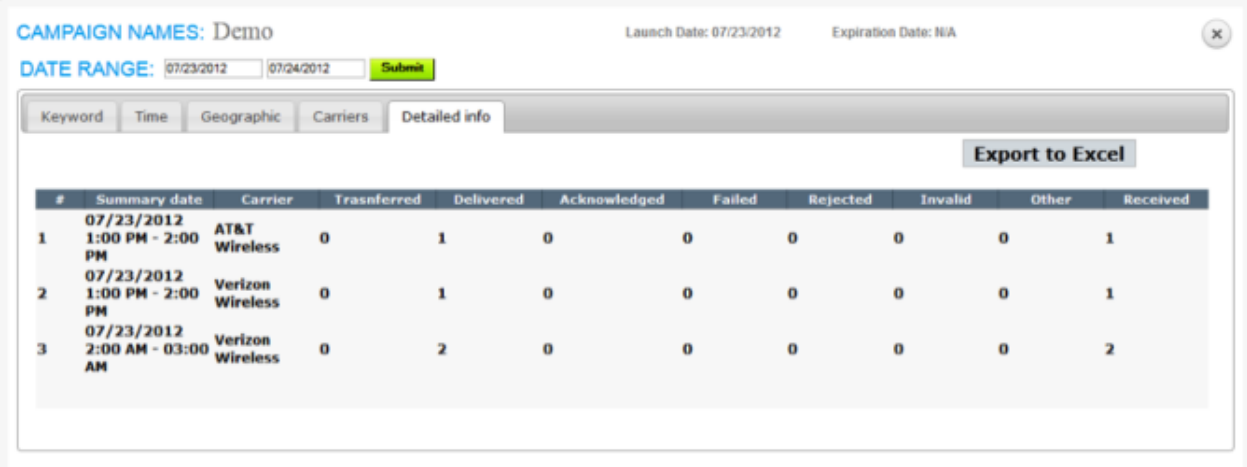
Broadcast Campaign Reports

There are 2 tabs of information available: **Carriers** and **Detailed Info**. The **Carriers** tab gives a breakdown of delivery distribution based on carriers and the message status of your campaign.

> **Note**: The carrier and status distributions are based on ALL MT & MO linked with the campaign, not just impressions.



The **Detailed Info** tab offers an hourly table of message delivery results per carrier. This is the detailed information behind the **Carrier** tab.



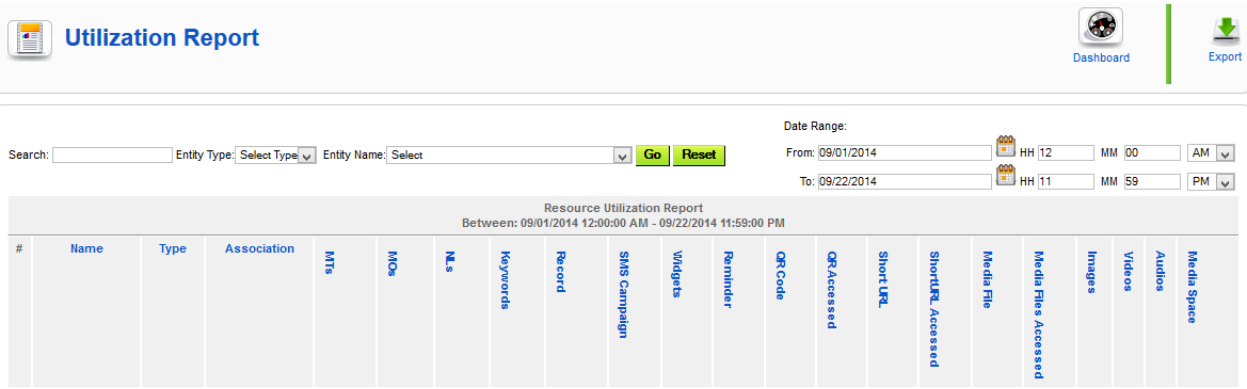
#	Summary date	Carrier	Trasnferred	Delivered	Acknowledged	Failed	Rejected	Invalid	Other	Received
1	07/23/2012 1:00 PM - 2:00 PM	AT&T Wireless	0	1	0	0	0	0	0	1
2	07/23/2012 1:00 PM - 2:00 PM	Verizon Wireless	0	1	0	0	0	0	0	1
3	07/23/2012 2:00 AM - 03:00 AM	Verizon Wireless	0	2	0	0	0	0	0	2

Utilization Report

The Utilization reporting feature displays a listing of all statistics for each entity in the system. You can filter by **Type** (***OC (Operating Company)***, ***Agency***, or ***Client***) or **Entity Name**. There is also an option to restrict the date range. You can also search for a specific word or number.

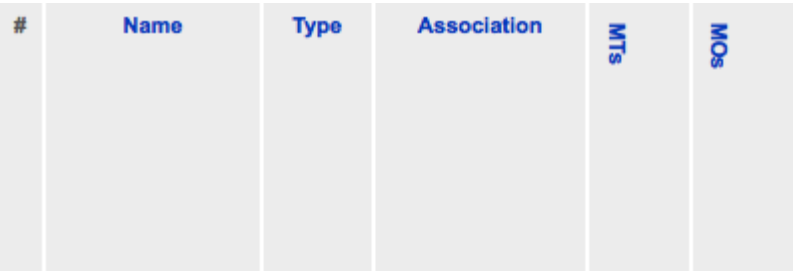
The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time. Once you have the results that you seek, you can export the data to a comma-separated value (CSV) text file. Read below to learn how to prepare your report.

You may access this feature by choosing **Reports > Utilization Report** from the toolbar. After choosing this menu item, you will see a page having the characteristics which we describe below.


Utilization Report
Dashboard
Export
Search:
Entity Type: Select Type
Entity Name: Select
Go
Reset
Date Range:
From: 09/01/2014 HH 12 MM 00 AM
To: 09/22/2014 HH 11 MM 59 PM
Resource Utilization Report
Between: 09/01/2014 12:00:00 AM - 09/22/2014 11:59:00 PM
Name Type Association MTs MOs NLs Keywords Record SMS Campaign Widgets Reminder QR Code QR Accessed Short URL ShortURL Accessed Media File Media Files Accessed Images Videos Audios Media Space

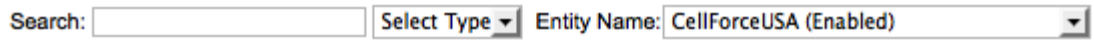
Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see all of the statistics.



Filters

On the left side of the report control panel, you'll find a group of filters:



Immediately above the column headings you'll find a **Search** field. Here you can enter a specific value, such as "Chicago" or "15615551313". Click the **Go** button to initiate the search. Any records containing the value in the **Search** field will appear in the results.

To the right of the **Search** field, you'll find two other filters for **Type** and **Entity Name**. You can choose values in one or more of these drop-down menus to further restrict the report listing.

Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Restrict by Date Range

On the right side of the report control panel, you find the **Date Range** section:

Here you can choose a beginning (**From**) and ending (**To**) of date range that will restrict the records that appear in the results.

1. Click the **From** calendar icon (for example, choose April 1).
2. Then, optionally, choose the hour (**HH**) and minutes (**MM**) that will define the precise time for the start of the report date range. Also choose ***AM*** or ***PM*** from the drop-down. You could enter 9:00 AM.
3. Next, click the **To** calendar icon (you might choose April 30).
4. Then, optionally, choose the hour (**HH**) and minutes (**MM**) that will define the precise time for the start of the report date range You could enter 5:00 PM.
5. Click the **Go** button to update the listing. Only the records that fall within the date range will appear in the results.
6. Click the **Reset** button to revert back to the original filter settings.

Exporting

Once you have the results that you seek, you can export the data to a comma-separated value (CSV) text file. You can easily export the listing by following these simple steps:

1. Click the **Export** icon in the upper left corner of the page.

2. When the window appears, choose the location in which you want to save the CSV file.
3. Click **Save**.

Tools

In this chapter we explain how to use these tools:

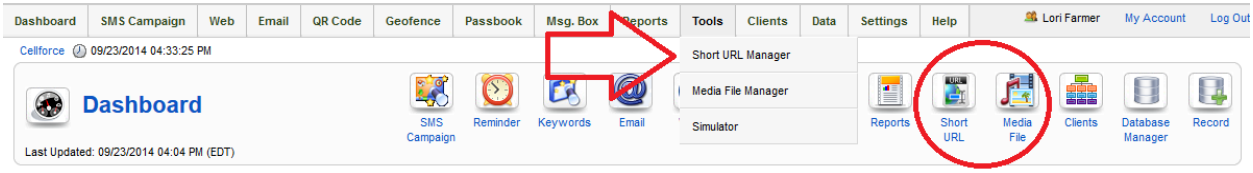
- Short URL Manager
- Create a URL – Short URL Wizard
- Media File Manager
- Create a Media File – Media File Wizard

You may access these tools from the **Tools** menu in the **Textboom** toolbar or by the quick access links under the toolbar on the Dashboard.

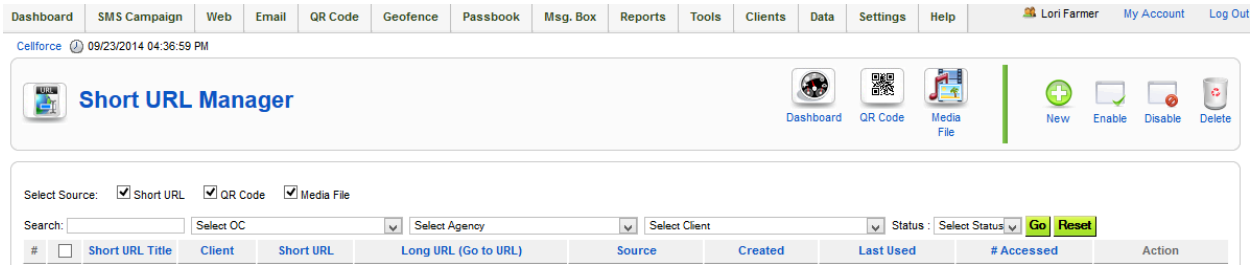
Short URL Manager

The **Short URL Manager** displays a listing of all the Short URLs for your account. You can filter by **OC (Operating Company)**, **Agency**, **Client**, or **Status**. You can edit, disable, re-enable, and delete Short URL. You may also perform a search for a specific word or number. The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time.

You may access this feature by choosing **Tools > Short URL Manager** from the toolbar or access it via the quick access links under the toolbar on the Dashboard.

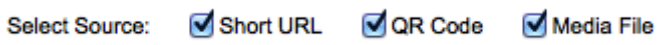


After choosing this menu item, you'll see a page having the characteristics that we describe below.



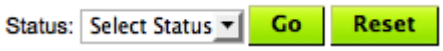
Filters

On the left side of the report control panel, you'll find a group of filters (below). By default, the listing displays all Short URLs, QR Codes, and Media Files links. Uncheck one or more of the boxes to remove a category from the listing:



You may also choose from one or more of these drop-down menus to filter by **OC (Operating Company)**, **Agency**, **Client**, or **Status**.

Along with these filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.



Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Add, Enable, Disable, or Delete Short URLs

In the upper right corner of the page, locate these icons:

Check the box next to any record, and then click the icon that corresponds to the function you want to apply:

- **New** - add a new short URL .
- **Enable** - enables a record that has been previously been disabled.
- **Disable** - Click this icon to disable the Short URL. A disabled Short URL cannot be used again until it is enabled.
- **Delete** - click this icon to delete a Short URL. A deleted short URL is both disabled and invisible.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see a list of all your short URLs.

Managing Short URLs

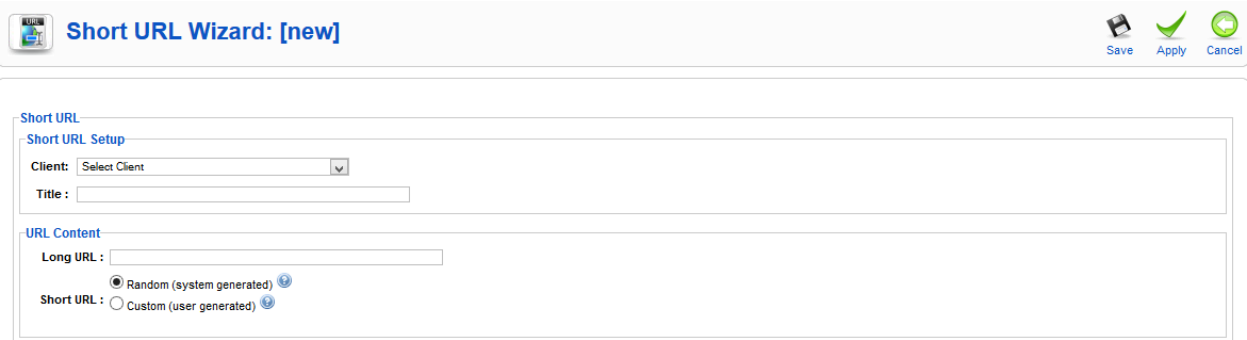
At the extreme right end of each record in the listing you'll find a series of small icons:

Click this icon to view statistics.
Click this icon to view a popup showing the Short URLs message dialogue.
Click this icon to edit the Short URL (you will exit the Short URL Manager).
Click this icon to enable the Short URL.
Click this icon to disable the Short URL. A disabled Short URL cannot be used again until it is enabled.
Click this icon to delete a Short URL. A deleted Short URL is both disabled and invisible.

Create a Short URL

With this feature, you may create a **Short URL** for use with your campaigns. A short URL is a compact web address that is excellent when the target web address is lengthy or cryptic. Read below to see how easy it is to create a short URL.

You may access this feature by choosing **Tools > Short URL Manager > Short URL Wizard** from the toolbar or click on **New** in the **Short URL Manager**. After choosing this menu item, you will see a page much like the figure below:



Follow these steps to create a Short URL:

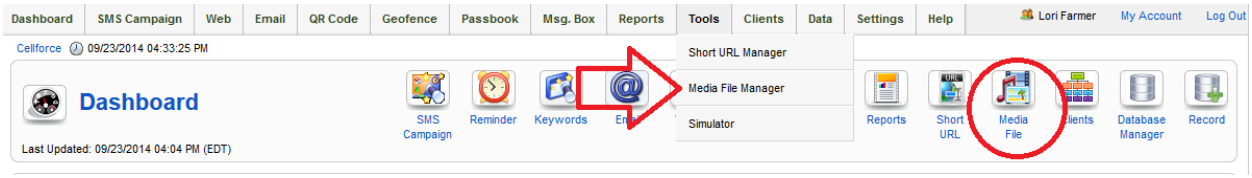
1. Click the **Client** drop-down list, and then select the correct client name.
2. Enter a **Title** for the short URL.
3. Enter the **Long URL**-this is the full address of the target web page.
4. Instead of accepting the default **Random** setting, you might want to specify your own **Custom** URL. To do so, simply choose the **Custom** option, enter the **Custom Short URL**, and then click the **Check Availability** button.

5. When you're happy with the entries, click the **Save** button in the upper right corner of the page. Click **Cancel** to discard your entries.

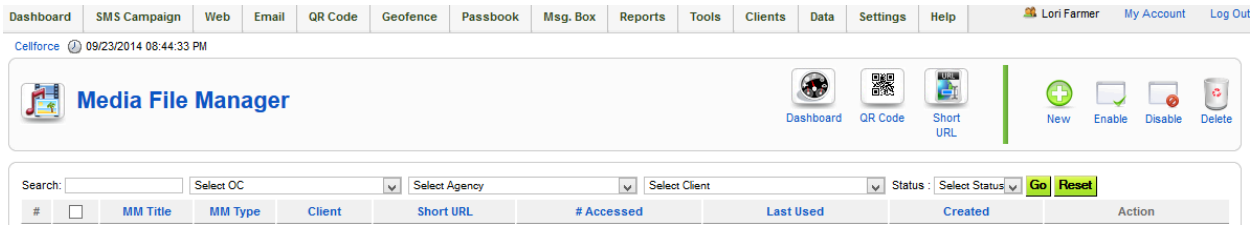
Media File Manager

The **Media File Manager** displays a listing of all the media files for your account. You can filter by **OC (Operating Company)**, **Agency**, **Client**, or **Status**. You can edit, disable, re-enable, and delete media files. You may also perform a search for a specific word or number. The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time.

You may access this feature by choosing **Tools > Media File Manager** from the toolbar or from the quick access icon under the toolbar on the Dashboard.



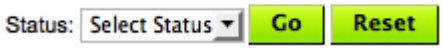
After choosing this menu item, you'll see a page having the characteristics which we describe below.



Filters

On the left side of the report control panel, you'll find a group of filters (below). Choose from one or more of these drop-down menus to filter by **OC (Operating Company)**, **Agency**, **Client**, or **Status**.

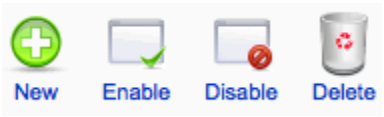
Along with these filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.



Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Add, Enable, Disable, or Delete Media Files

In the upper right corner of the page, locate these icons:



Check the box next to any record, and then click the icon that corresponds to the function you want to apply:

- **New** - add a new media file.
- **Enable** - enables a record that has been previously been disabled.
- **Disable** - Click this icon to disable the media file. A disabled media file cannot be used again until it is enabled.
- **Delete** - click this icon to delete the media file. A deleted media file is both disabled and invisible.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see a list of all your media files.

Managing Media Files

At the extreme right end of each record in the listing you'll find a series of small icons:

Click this icon to view statistics.
Click this icon to preview the media file.
Click this icon to edit the media file (you will exit the Media File Manager).
Click this icon to disable the media file. A disabled media file cannot be used again until it is enabled.

Click this icon to delete a media file. A deleted media file is both disabled and invisible.

Add a Media File

With this feature, you may create a new **Media File** for use with your campaigns. **Textboom** supports these types of media files:

- .asf — ASF digital audio/video file format
- .avi — AVI movie file format
- .flv — FLV Flash video file format
- .gif — Graphics Interchange Format image file format
- .jpeg (.jpg) — Joint Photographic Experts Group image file format
- .m4v — raw MPEG4 video format
- .mov, mp4, m4a, 3gp, 3g2, mj2 — QuickTime/MPEG4/Motion JPEG 2000 file format
- .png — Portable Network Graphics image file format
- .wmv — Windows Media Video file format
- .mp3 — mp3 audio files format

Read below to see how easy it is to add a media file to your account.

You may access this feature by choosing **Tools > Media File Manager > Media File Wizard** from the toolbar or by clicking on **New** in the **Media File Manager**. After choosing this menu item, you will see a page much like the figure below:

Follow these steps to add a media file to your account:

1. Click the **Client** drop-down list, and then select the correct client name.
2. Enter a **Title** for the media file.
3. Click the **Browse** button for the **Media File**. Locate the file and click **Open** to return to the page.
4. Instead of accepting the default **Random** setting, you might want to specify your own **Custom** URL for the media file. To do so, simply choose the **Custom** option, enter the **Custom Short URL**, and then click the **Check Availability** button.
5. When you're happy with the entries, click the **Save** button in the upper right corner of the page. Click **Cancel** to discard your entries.

Billing

This chapter covers billing for operating companies, agencies, and clients. In the topics below, we explain how to create and manage billing packages for each of these.

- Pricing Package Manager
- OC Pricing Manager
- New OC Pricing Package
- Agency Pricing Manager
- New Agency Pricing Package
- Client Pricing Manager
- Client Pricing Package

To access agency tools, choose the **Clients > Billing** menu item in the **Textboom** toobar.

Agency Pricing Manager

The **Agency Pricing Manager** displays a listing of all agency pricing packages for the OC you choose. You can filter by **Status**, and edit, disable, reenable, and delete packages. You may also perform a search for a specific word or number. The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time.

You may access this feature by choosing **Clients > Billing > Agency Pricing Manager** from the toolbar. After choosing this menu item, you'll see a page having the characteristics which we describe below.

Filters

On the left side of the report control panel, you'll find a group of filters (below). Choose from the drop-down menu to filter by **Status**.

Along with these filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.

Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Add, Enable, Disable, or Delete Pricing Packages

In the upper right corner of the page, locate these icons:

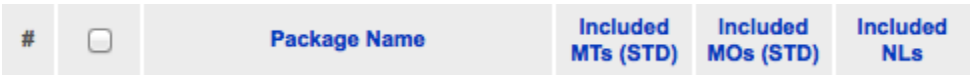
Check the box next to any record, and then click the icon that corresponds to the function you want to apply:

- **New** - add a new Agency Pricing Package.

- **Enable** - enables a record that has been previously been disabled.
- **Disable** - Click this icon to disable the package. A disabled package cannot be used again until it is enabled.
- **Delete** - click this icon to delete the package. A deleted package is both disabled and invisible.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see a list of all your pricing packages:



Managing Pricing Packages

At the extreme right end of each record in the listing you'll find a series of small icons:

Click this icon to edit the package (you will exit the Pricing Manager).
Click this icon to enable the package .
Click this icon to disable the package. A disabled package cannot be used again until it is enabled.
Click this icon to delete the user. A deleted package is both disabled and invisible.

Client Pricing Manager

The **Client Pricing Manager** displays a listing of all agency pricing packages for the OC you choose. You can filter by **Status**, and edit, disable, reenable, and delete packages. You may also perform a search for a specific word or number. The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time.

You may access this feature by choosing **Clients > Billing > Client Pricing Manager** from the toolbar. After choosing this menu item, you'll see a page having the characteristics which we describe below.

Filters

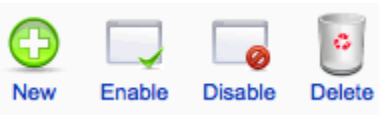
On the left side of the report control panel, you'll find a group of filters (below). Choose from the drop-down menu to filter by **Status**.

Along with these filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.

Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Add, Enable, Disable, or Delete Pricing Packages

In the upper right corner of the page, locate these icons:



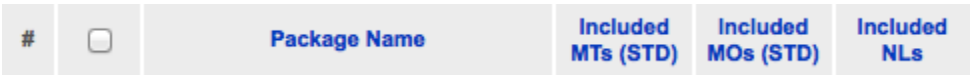
Check the box next to any record, and then click the icon that corresponds to the function you want to apply:

- **New** - add a new Client Pricing Package.

- **Enable** - enables a record that has been previously been disabled.
- **Disable** - Click this icon to disable the package. A disabled package cannot be used again until it is enabled.
- **Delete** - click this icon to delete the package. A deleted package is both disabled and invisible.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see a list of all your packages.



Managing Pricing Packages

At the extreme right end of each record in the listing you'll find a series of small icons:

Click this icon to edit the package (you will exit the Pricing Manager).
Click this icon to enable the package .
Click this icon to disable the package. A disabled package cannot be used again until it is enabled.
Click this icon to delete the user. A deleted package is both disabled and invisible.

New Client Pricing Package

With the **New Client Pricing Package** feature, you can create a new client pricing package (which is quite similar to creating a new agency pricing package). You may access this feature by choosing **Clients > Billing > Client Pricing Manager > New Client PP** from the toolbar. After choosing this menu item, you will see a page containing the fields that we display in the figures below.

Configuring the Package

Notice that there are several panels on the page:

- Select Agency
- Package Details
- One Time
- Per Cycle
- Progressive Pricing Table

The first panel is **Select Agency**. Choose the agency that contains the client for which you want to configure a new pricing package. The second panel is **Package Details**:

Most items are self-explanatory, but we guide you through the entire setup here in this topic. To begin, follow these steps:

1. First, enter a **Package Name** and click the **Check Availability** button to ensure that the name is available. Also enter a **Package Description**.
2. Choose a **Billing Cycle**.
3. If necessary, set the **Status** to ***Disabled***.

In the next section, you may optionally specify the **One Time** charges:

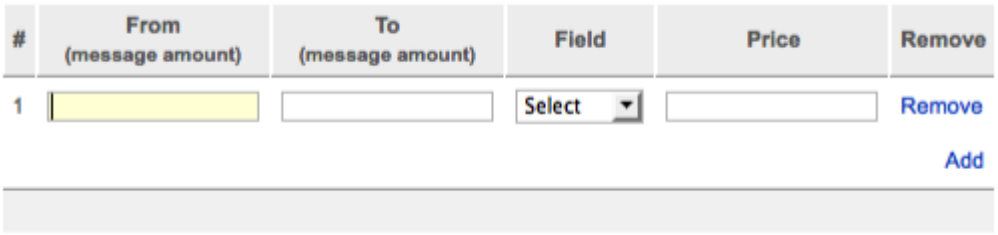
Decide if you want to charge initialization fees for **Set up**, **Pre-paid MTs**, **Pre-Paid MOs**, and/or **Pre-paid NLs**.

In the **Per Cycle** section, you may enter the recurring charges:

Follow these steps to complete this section:

1. In **Included MTs**, enter the number of message terminations that you want to permit for each billing cycle.
2. In **Included MOs**, enter the number of message originations that you want to permit for each billing cycle.
3. Do the same for **Included NLs** and **Included Keywords**.
4. If you want to allow credits to accumulate and rollover into the next billing cycle, then consider changing some or all of the remaining options. By choosing **Yes** for each of the options, decide if you want to permit **MT Rollover**, **MO Rollover**, and/ or **NL Rollover**.
5. Also decide if you want to permit **Retroactive Tiered Pricing**.

You may choose to adopt progressive pricing structure. If so, then look to the last section, **Progressive Pricing Table**:



Follow these simple steps to implement progressive pricing:

1. You need to specify a range for each tier. The first row represents the first pricing tier. Enter values for **From** and **To** , which represent the lower and upper limits of the message count for the first tier.
2. In the **Field** drop-down list, choose the field containing the message count that you want to evaluate to see if it falls within the range you set in the previous step.
3. Enter the **Price** for this tier.
4. To enter another tier, click the **Add** link.

When you are done configuring the operating company, click the **Save** button to commit your changes and complete the pricing package.

New Agency Pricing Package

With the **New Agency Pricing Package** feature, you can create an Agency new pricing package (which is quite similar to creating a new OC pricing package). You may access this feature by choosing **Clients > Billing > Agency Pricing Manager > New Agency PP** from the toolbar. After choosing this menu item, you will see a page containing the fields that we display in the figures below.

Configuring the Package

Notice that there are several panels on the page:

- Select OC
- Package Details
- One Time
- Per Cycle
- Progressive Pricing Table

The first panel is **Select OC**. Choose the operating company that contains the agency for which you want to configure a new pricing package. The second panel is **Package Details**:

Most items are self-explanatory, but we guide you through the entire setup here in this topic. To begin, follow these steps:

1. First, enter a **Package Name** and click the **Check Availability** button to ensure that the name is available. Also enter a **Package Description**.
2. Choose a **Billing Cycle**.
3. If necessary, set the **Status** to ***Disabled***.

In the next section, you may optionally specify the **One Time** charges:

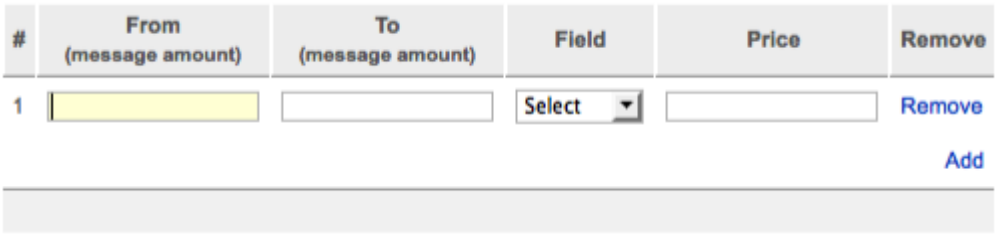
Decide if you want to charge initialization fees for **Set up**, **Pre-paid MTs**, **Pre-Paid MOs**, and/or **Pre-paid NLs**.

In the **Per Cycle** section, you may enter the recurring charges:

Follow these steps to complete this section:

4. In **Included MTs**, enter the number of message terminations that you want to permit for each billing cycle.
5. In **Included MOs**, enter the number of message originations that you want to permit for each billing cycle.
6. Do the same for **Included NLs** and **Included Keywords**.
7. If you want to allow credits to accumulate and rollover into the next billing cycle, then consider changing some or all of the remaining options. By choosing **Yes** for each of the options, decide if you want to permit **MT Rollover**, **MO Rollover**, and/ or **NL Rollover**.
8. Also decide if you want to permit **Retroactive Tiered Pricing**.

You may choose to adopt progressive pricing structure. If so, then look to the last section, **Progressive Pricing Table**:



Follow these simple steps to implement progressive pricing:

9. You need to specify a range for each tier. The first row represents the first pricing tier. Enter values for **From** and **To**, which represent the lower and upper limits of the message count for the first tier.
10. In the **Field** drop-down list, choose the field containing the message count that you want to evaluate to see if it falls within the range you set in the previous step.
11. Enter the **Price** for this tier.
12. To enter another tier, click the **Add** link.

When you are done configuring the operating company, click the **Save** button to commit your changes and complete the pricing package.

New OC Pricing Package

With the **New OC Pricing Package** feature, you can create a new operating company (OC) pricing package. You may access this feature by choosing **Clients > Billing > OC Pricing Manager > New OC PP** from the toolbar. After choosing this menu item, you will see a page containing the fields that we display in the figures below.

Configuring the Package

Notice that there are several panels on the page:

- Package Details
- One Time
- Per Cycle
- Progressive Pricing Table

The first panel is **Package Details**:

Most items are self-explanatory, but we guide you through the entire setup here in this topic. To begin, follow these steps:

1. First, enter a **Package Name** and click the **Check Availability** button to ensure that the name is available. Also enter a **Package Description**.
2. Choose a **Billing Cycle**.
3. If necessary, set the **Status** to ***Disabled***.

In the next section, you may optionally specify the **One Time** charges:

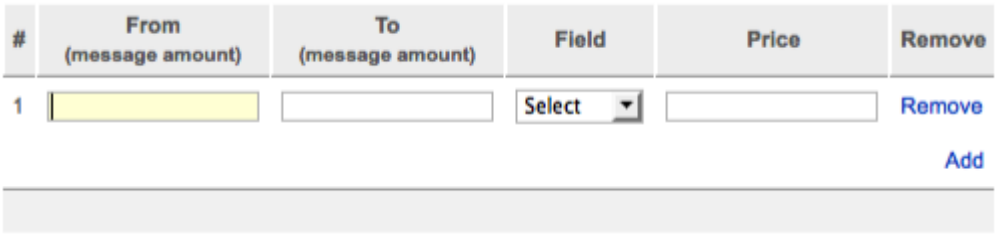
Decide if you want to charge initialization fees for **Set up**, **Pre-paid MTs**, **Pre-Paid MOs**, and/or **Pre-paid NLs**.

In the **Per Cycle** section, you may enter the recurring charges:

Follow these steps to complete this section:

4. In **Included MTs**, enter the number of message terminations that you want to permit for each billing cycle.
5. In **Included MOs**, enter the number of message originations that you want to permit for each billing cycle.
6. Do the same for **Included NLs** and **Included Keywords**.
7. If you want to allow credits to accumulate and rollover into the next billing cycle, then consider changing some or all of the remaining options. By choosing **Yes** for each of the options, decide if you want to permit **MT Rollover**, **MO Rollover**, and/ or **NL Rollover**.
8. Also decide if you want to permit **Retroactive Tiered Pricing**.

You may choose to adopt progressive pricing structure. If so, then look to the last section, **Progressive Pricing Table**:



Follow these simple steps to implement progressive pricing:

9. You need to specify a range for each tier. The first row represents the first pricing tier. Enter values for **From** and **To**, which represent the lower and upper limits of the message count for the first tier.

10. In the **Field** drop-down list, choose the field containing the message count that you want to evaluate to see if it falls within the range you set in the previous step.
11. Enter the **Price** for this tier.
12. To enter another tier, click the **Add** link.

When you are done configuring the operating company, click the **Save** button to commit your changes and complete the pricing package.

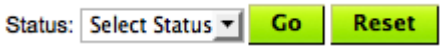
OC Package Manager

The **OC Pricing Manager** displays a listing of all agency pricing packages for the agency you choose. You can filter by **Status**, and edit, disable, re-enable, and delete packages. You may also perform a search for a specific word or number. The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time.

You may access this feature by choosing **Clients > Billing > OC Pricing Manager** from the toolbar. After choosing this menu item, you'll see a page having the characteristics which we describe below.

Filters

On the left side of the report control panel, you'll find a group of filters (below). Choose from the drop-down menu to filter by **Status**.

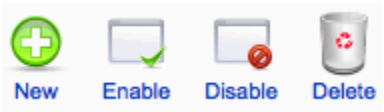


Along with these filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.

Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Add, Enable, Disable, or Delete Pricing Packages

In the upper right corner of the page, locate these icons:

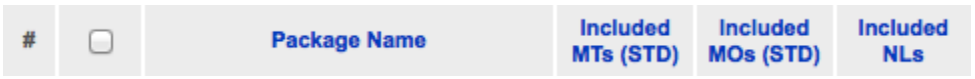


Check the box next to any record, and then click the icon that corresponds to the function you want to apply:

- **New** - add a new Pricing Package.
- **Enable** - enables a record that has been previously been disabled.
- **Disable** - Click this icon to disable the package. A disabled package cannot be used again until it is enabled.
- **Delete** - click this icon to delete the package. A deleted package is both disabled and invisible.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see a list of all your packages.



Managing Pricing Packages

At the extreme right end of each record in the listing you'll find a series of small icons:

Click this icon to edit the package (you will exit the Pricing Manager).
Click this icon to enable the package .
Click this icon to disable the package. A disabled package cannot be used again until it is enabled.
Click this icon to delete the user. A deleted package is both disabled and invisible.

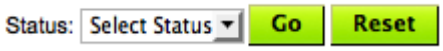
Pricing Package Manager

The **Pricing Package Manager** displays a listing of all pricing packages, including OC pricing packages , Agency pricing packages and Client pricing packages. You can filter by **Status**, and edit, disable, re-enable, and delete packages. You may also perform a search for a specific word or number. The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time.

You may access this feature by choosing **Clients > Billing** from the toolbar. After choosing this menu item, you'll see a page having the characteristics which we describe below.

Filters

On the left side of the report control panel, you'll find a group of filters (below). Choose from the drop-down menu to filter by **Status**.

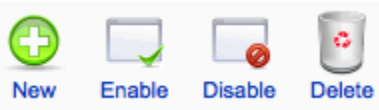


Along with these filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.

Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Add, Enable, Disable, or Delete Pricing Packages

In the upper right corner of the page, locate these icons:



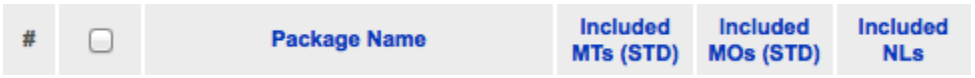
Check the box next to any record, and then click the icon that corresponds to the function you want to apply:

- **New** - add a new Pricing Package.

- **Enable** - enables a record that has been previously been disabled.
- **Disable** - Click this icon to disable the package. A disabled package cannot be used again until it is enabled.
- **Delete** - click this icon to delete the package. A deleted package is both disabled and invisible.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see a list of all your packages.



Managing Pricing Packages

At the extreme right end of each record in the listing you'll find a series of small icons:

Click this icon to edit the package (you will exit the Pricing Manager).
Click this icon to enable the package.
Click this icon to disable the package. A disabled package cannot be used again until it is enabled.
Click this icon to delete the user. A deleted package is both disabled and invisible.

Agency

An agency is a division of an Operating Company, which may or may not correspond to an actual business. An agency may contain one or more clients. In the topics below we explain how to create and manage agencies.

- Agency Dashboard
- Agency User Manager
- New Agency User
- New Agency

To access agency tools, choose the **Clients > Clients Manager > Agency** menu item in the **Textboom** toobar.

Agency Dashboard

The **Agency Dashboard**, also known as **Agency Manager**, displays a listing of all agencies for your account. You may access this feature by choosing **Clients > Clients Manager > Agency** from the toolbar. After choosing this menu item, you'll see a page having the characteristics which we describe below.

Filters

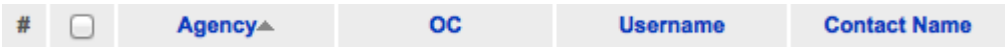
On the left side of the report control panel, you'll find the **Status** filter. Choose one of the items and watch for the results to change accordingly.

Along with this filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.

Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will find all of the email campaigns.



Managing Agencies

At the extreme right end of each record in the listing you'll find a series of small icons:

- Click this icon to view the agency details (you will exit the Agency Manager).
- Click this icon to edit the Agency (you will exit the Agency Manager).
- Click this icon to enable the agency.
- Click this icon to disable the agency. A disabled agency cannot be used again until it is enabled.
- Click this icon to delete an agency. A deleted agency is both disabled and invisible.

Agency User Manager

The **Agency User Manager** displays a listing of all users for the agency that you choose. You can filter by **Agency** or **Status**. You can edit, disable, re-enable, and delete users. You may also perform a search for a specific word or number. The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time.

You may access this feature by choosing **Clients > Clients Manager > Agency > User Manager** from the toolbar. After choosing this menu item, you'll see a page having the characteristics which we describe below.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will find all of the agency users.

Managing Users

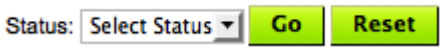
At the extreme right end of each record in the listing you'll find a series of small icons:

Click this icon to edit the user (you will exit the User Manager).
Click this icon to enable the user.
Click this icon to disable the user. A disabled user cannot be used again until it is enabled.
Click this icon to delete the user. A deleted user is both disabled and invisible.

Filters

On the left side of the report control panel, you'll find a group of filters (below). Choose from one or more of these drop-down menus to filter by **Agency** or **Status**.

Along with these filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.



Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Add, Enable, Disable, or Delete Users

In the upper right corner of the page, locate these icons:

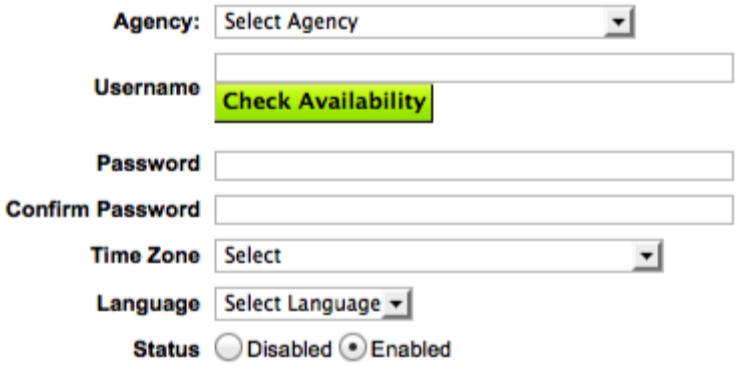
Check the box next to any record, and then click the icon that corresponds to the function you want to apply:

- **New** - add a new Agency User .
- **Enable** - enables a record that has been previously been disabled.
- **Disable** - Click this icon to disable the user. A disabled user cannot be used again until it is enabled.
- **Delete** - click this icon to delete the user. A deleted user is both disabled and invisible.

New Agency User

The **New Agency User** feature is a tool for creating an agency user. We provide you with many options, and yet it's quite easy to setup.

You may access the **Agency User** feature by choosing **Clients > Clients Manager > Agency > User Manager > New User** from the toolbar. After choosing this menu item, you will see a page containing fields like the ones we display in the figures below.

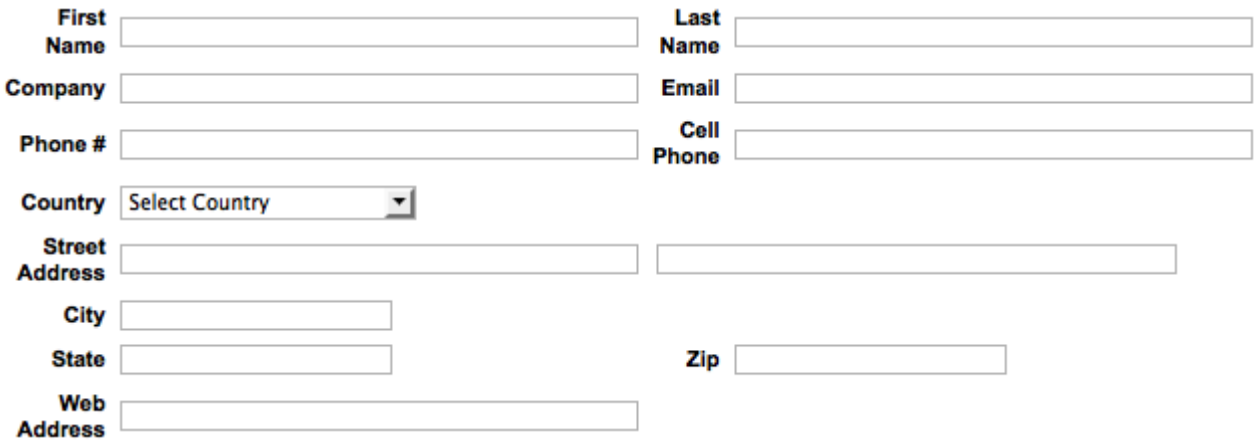


Configuring the User Account

To create a user account, you simply complete all the fields and then save the user profile. To begin, follow these steps:

1. From the drop-down list, click the **Agency** to which you want to add the user.
2. Enter the **Username**, then click the **Check Availability** button.
3. Enter the **Password**, then enter the same value for **Confirm Password**.
4. Choose the **Time Zone** and **Language** and, if necessary, choose ***Disabled*** for the **Status**.

The right side of the page contains the remain user properties (see figure below). Continue following the steps below to complete setup of the user account.



5. Enter the **First Name, Last Name, Company**, **Email** address, **Phone #** and **Cell Phone** for this the user.
6. Choose the **Country**, then enter all the address information.
7. Finally, enter the **Web Address** for this user.
8. Click the **Save** button to commit your changes and complete the wizard.

New Agency

The **New Agency** feature is a tool for creating a new agency. Here, you define the username, password, business information, rights and permissions, billing package, and so on. After saving an agency profile, you may then return to edit most of its settings.

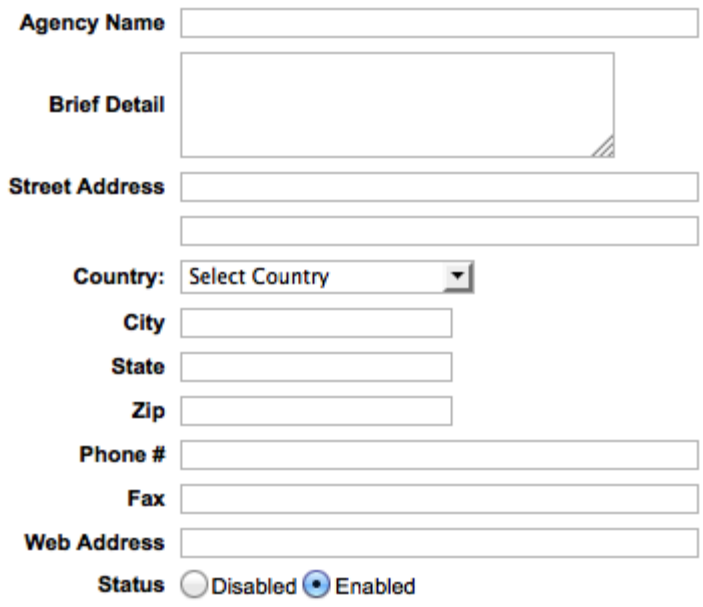
You may access this feature by choosing **Clients > Clients Manager > Agency > New Agency** from the toolbar. After choosing this menu item, you will see a page containing the fields that we display in the figures below.

Configuring the Agency

Notice that there are several panels on the page:

- Select OC
- Agency Detail
- Contact Details
- Billing
- Shortcode
- User Messaging
- Agency Setup
- Rights & Permissions

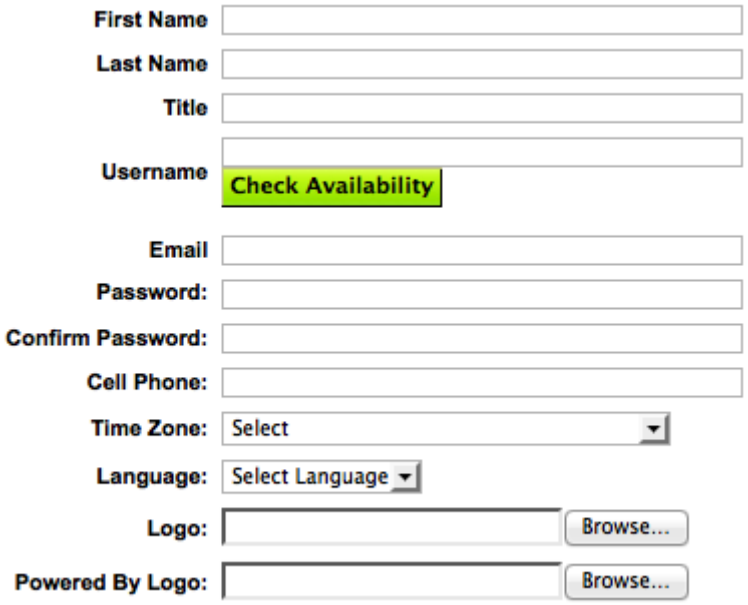
Page down to see all of the details. Then come back to the top of the page. The first panel is **Select OC**. The second panel is **Agency Detail**, and it contains these fields:



Most items are self-explanatory, but we guide you through the entire setup here in this topic. To begin, follow these steps:

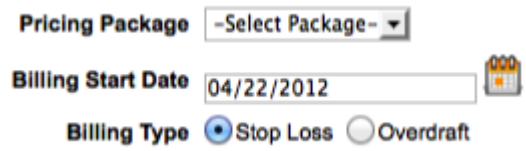
1. First, choose the **OC** (operating company) in which you will want to place the agency.
2. In **Agency Name**, enter the name of the operating company.
3. Describe the company in **Brief Detail**, and then enter the **Street Address**.
4. Choose a **Country** from the drop-down list, and then enter the **City**, **State** and **Zip** code.
5. Enter a **Phone #**, **Fax** number, **Web Address** and, if necessary, set the **Status** to ***Disabled***.

Next, you may enter the **Contact Details** for the primary contact of the operating company. These are found in the panel on the upper right side of the page:



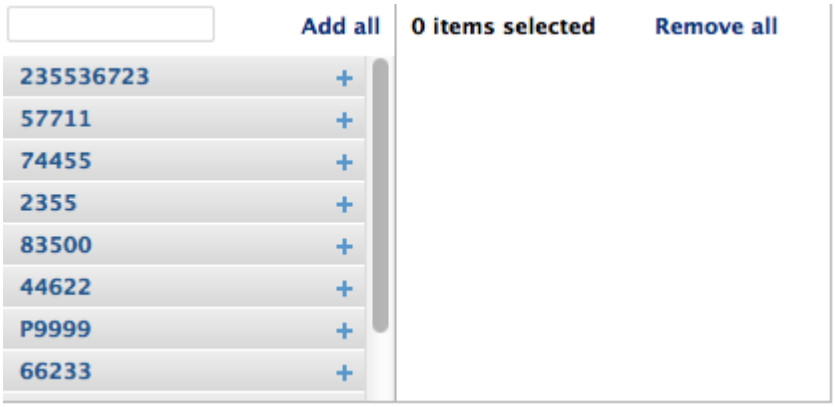
6. Enter the **First Name** and **Last Name**, and **Title**.
7. Enter the **Username**, and then click the **Check Availability** button.
8. Enter an **Email** address.
9. Enter the **Password**, then enter the same value for **Confirm Password**.
10. Enter the **Cell Phone** number, and then choose the **Time Zone** and **Language**.
11. Click the **Browse** button to choose a **Logo** image from your computer. Do the same for **Powered By Logo**.

Next we'll look at the **Billing** panel:



12. Choose the **Pricing Package** that you want to apply to this operating company.
13. Choose the **Billing Start Date**.
14. Decide if you would rather set the **Billing Type** to ***Overdraft***. **NOTE:** Stop Loss is a billing type that uses the data taken from the billing package. An account will disable when all available credits are used. Overdraft billing type uses the data taken from the billing package, but will not disable the account when all available credits have been used.

Optionally, you may choose **Shortcodes**. Notice the listing of codes on the left side of this panel. Follow the steps below to setup the shortcodes:



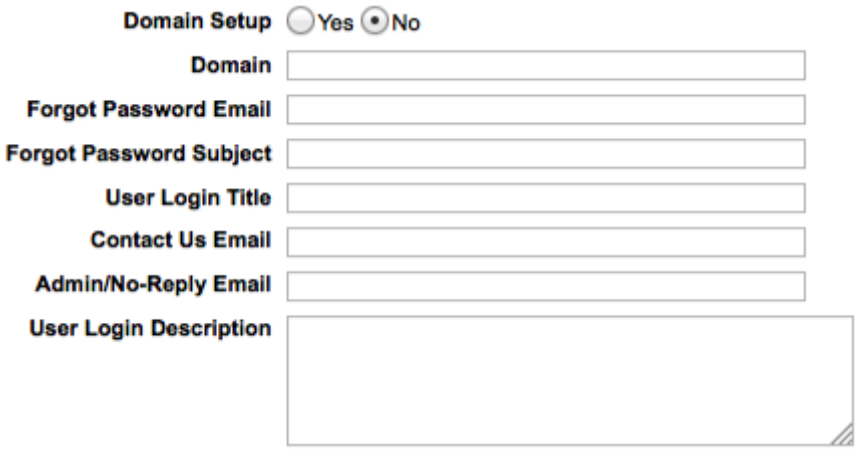
15. For each of the codes you want to apply, click the plus (+) sign. The code will appear on the right side.
16. If you change your mind, click the minus (-) sign to remove any codes that you previously added.

You might want to specify the default **User Messaging**. This section begins with the **Opt-Out Message** field on the left side:

NOTE: The User Messaging options are used for Opt-Out, Help and Subscription Reminders Messages, which may be sent to all records under that specific account. When any record engages with or responds to a campaign, these pre-defined User Messages will be used-depending on the account. We recommend completing these to maintain white-label settings. If these are left blank, a generic Textboom message will be used to respond to a record.

17. In the **User Messaging** section, enter the **Opt-Out Message, Help Message**, and **Subscription Reminder Message** for this operating company.

The next section is **Agency Setup**, where you may enter web, email and meta data information that pertains to this operating company. Here is an image of the left side of this section:



Throughout the entire section, enter the information that you want to apply to this operating company.

In the last section, **Rights & Permissions**, you'll find that this operating company has permissions to access all of the various features of **Textboom**. Examine the entire list and decide if you want to withhold any of these permissions. This might be useful if you are setting up multiple operating companies.

When you are done configuring the operating company, click the **Save** button to commit your changes and complete the wizard.

Client

A client uses the services of an Agency, which is a division of an Operating Company. An agency may contain one or more Clients. In the topics below we explain how to create and manage clients.

- Client Dashboard
- Client User Manager
- New Client User
- New Client

To access agency tools, choose the **Clients > Clients Manager > Clients** menu item in the **Textboom** toobar.

Client Dashboard

The **Client Dashboard**, also known as **Client Manager**, displays a listing of all clients for your account. You may access this feature by choosing **Clients > Clients Manager > Client** from the toolbar. After choosing this menu item, you'll see a page having the characteristics which we describe below.

Filters

On the left side of the report control panel, you'll find the **Status** filter. Choose one of the items and watch for the results to change accordingly.

Along with this filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.

Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will find all of the email campaigns.

Managing Clients

At the extreme right end of each record in the listing you'll find a series of small icons:

Click this icon to view the Client details (you will exit the Client Manager).
Click this icon to edit the Client (you will exit the Client Manager).
Click this icon to enable the client.
Click this icon to disable the client . A disabled client cannot be used again until it is

enabled.

Click this icon to delete a client. A deleted client is both disabled and invisible.

Client User Manager

The **Client User Manager** displays a listing of all client users for the agency you choose. You can filter by **OC**, **Agency**, **Client**, or **Status**. You can edit, disable, re-enable, and delete users. You may also perform a search for a specific word or number. The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time.

You may access this feature by choosing **Clients > Clients Manager > Client > User Manager** from the toolbar. After choosing this menu item, you'll see a page having the characteristics which we describe below.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will find all of the client users.

Managing Users

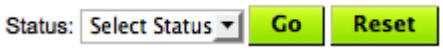
At the extreme right end of each record in the listing you'll find a series of small icons:

- Click this icon to edit the user (you will exit the User Manager).
- Click this icon to enable the user.
- Click this icon to disable the user. A disabled user cannot be used again until it is enabled.
- Click this icon to delete the user. A deleted user is both disabled and invisible.

Filters

On the left side of the report control panel, you'll find a group of filters (below). Choose from one or more of these drop-down menus to filter by **OC**, **Agency**, **Client**, or **Status**.

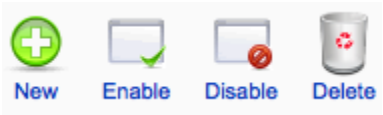
Along with these filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.



Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Add, Enable, Disable, or Delete Users

In the upper right corner of the page, locate these icons:



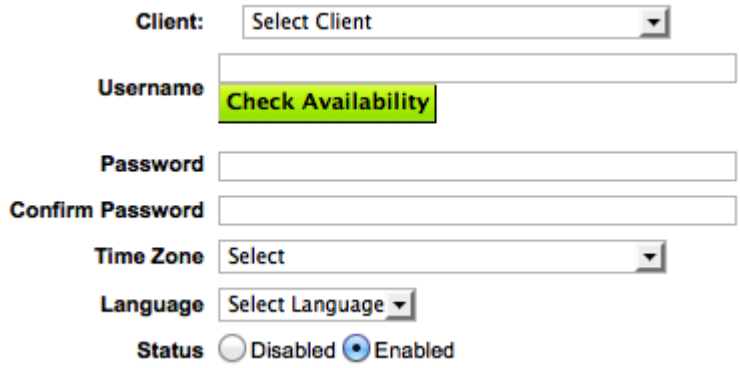
Check the box next to any record, and then click the icon that corresponds to the function you want to apply:

- **New** - add a new Client User.
- **Enable** - enables a record that has been previously been disabled.
- **Disable** - Click this icon to disable the user. A disabled user cannot be used again until it is enabled.
- **Delete** - click this icon to delete the user. A deleted user is both disabled and invisible.

New Client User

The **Client User** feature is a tool for creating a client user. We provide you with many options, and yet it's quite easy to setup.

You may access the **OC User** feature by choosing **Clients > Clients Manager > Client > User Manager > New User** from the toolbar. After choosing this menu item, you will see a page containing fields like the ones we display in the figures below.

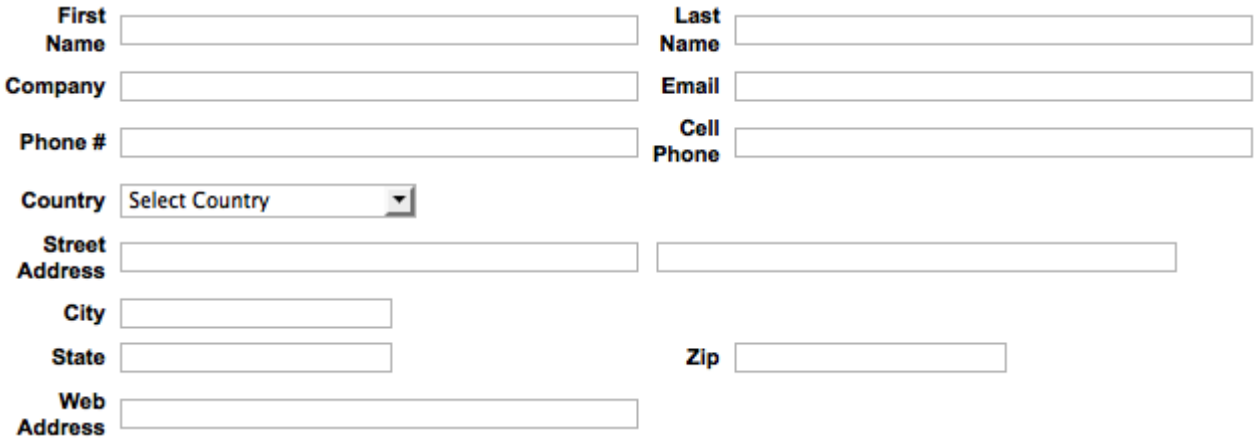


Configuring the User Account

To create a user account, you simply complete all the fields and then save the user profile. To begin, follow these steps:

1. From the drop-down list, click the **Client** to which you want to add the user.
2. Enter the **Username**, then click the **Check Availability** button.
3. Enter the **Password**, then enter the same value for **Confirm Password**.
4. Choose the **Time Zone** and **Language** and, if necessary, choose ***Disabled*** for the **Status**.

The right side of the page contains the remain user properties (see figure below). Continue following the steps below to complete setup of the user account.



5. Enter the **First Name, Last Name, Company**, **Email** address, **Phone #** and **Cell Phone** for this the user.
6. Choose the **Country**, then enter all the address information.
7. Finally, enter the **Web Address** for this user.
8. Click the **Save** button to commit your changes and complete the wizard.

New Client

The **New Client** feature is a tool for creating a client. Here, you define the username, password, business information, rights and permissions, billing package, and so on. After saving a client profile, you may then return to edit most of its settings.

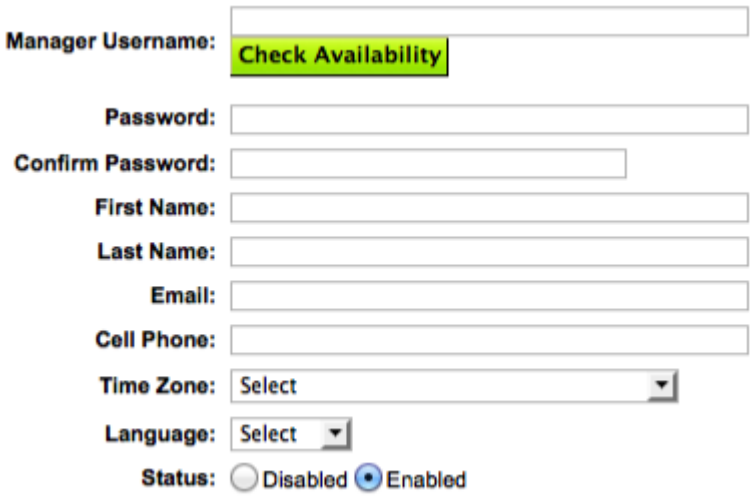
You may access this feature by choosing **Clients > Clients Manager > Client > New Client** from the toolbar. After choosing this menu item, you will see a page containing the fields that we display in the figures below.

Configuring the Client

Notice that there are several panels on the page:

- Select Agency
- Client Information
- Company Details
- User Messaging
- Social Networking
- Billing

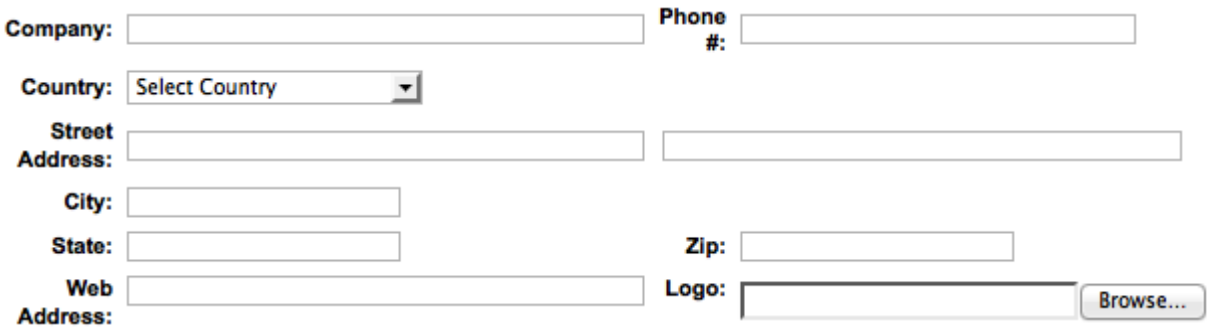
Page down to see all of the details. Then come back to the top of the page. The first panel is **Client Information**, and it contains these fields:



Most items are self-explanatory, but we guide you through the entire setup here in this topic. To begin, follow these steps:

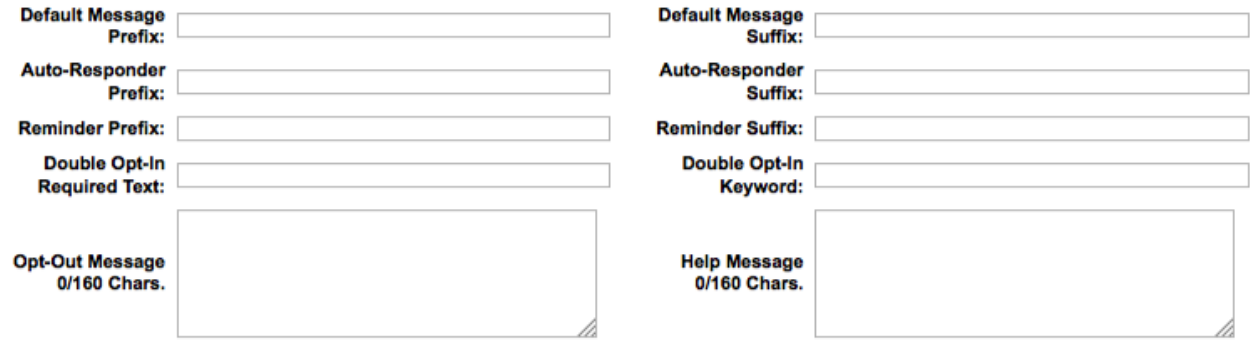
1. First choose the **Agency** in which you want to group this client. Then, In **Manager User Name**, enter the user name of the manager that you want to assign to this client, then click the **Check Availability** button.
2. Enter the **Password**, then enter the same value for **Confirm Password**.
3. Enter the **First Name** and **Last Name**, and **Email** address.
4. Enter the **Cell Phone** number, and then choose the **Time Zone** and **Language**.
5. If necessary, set the **Status** to ***Disabled***.

Next, you may enter the **Company Details**. These are found in the panel on the upper right side of the page:



6. Enter the **Company Phone #**, and choose a **Country**.
7. Enter a **Street Address**, **City**, **State** and **Zip** code.
8. Optionally, enter **Web Address**.
9. Click the **Browse** button to choose a **Logo** image from your computer.

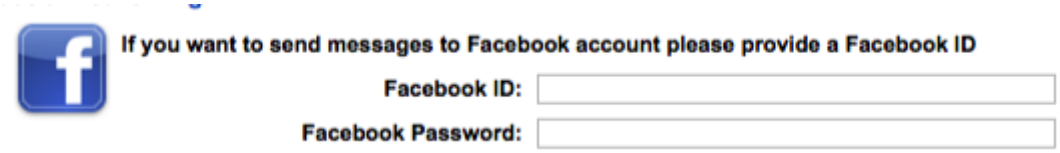
Next we'll look at the **User Messaging** panel. Here you can enter the prefixes and suffixes for messages, auto-responders, and reminders. All of these entries are optional.



10. Enter a **Default Message Prefix** and **Default Message Suffix**.
11. Enter a **Auto-Responder Prefix** and **Auto-Responder Suffix**.

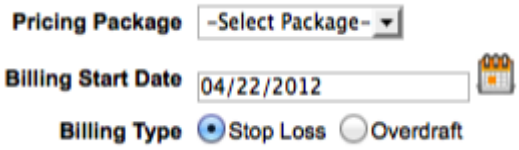
12. Enter a **Double Opt-In Prefix** and **Double Opt-In Suffix**.
13. Enter an **Opt-Out Message**, **Help Message**, and **Subscription Reminder Message**.

Optionally, you choose from a number of social media options in the **Social Networking** panel:



Facebook is one of many social media venues for which you can supply the access credentials such as the **ID** and **Password**.

You can also setup the **Billing** options:



14. Choose the **Pricing Package** that you want to apply to this operating company.
15. Choose the **Billing Start Date**.
16. Decide if you would rather set the **Billing Type** to ***Overdraft***.

Operating Company

An operating company is an entity for grouping Agencies. An agency may contain one or more Clients. In the topics below we explain how to create and manage operating companies.

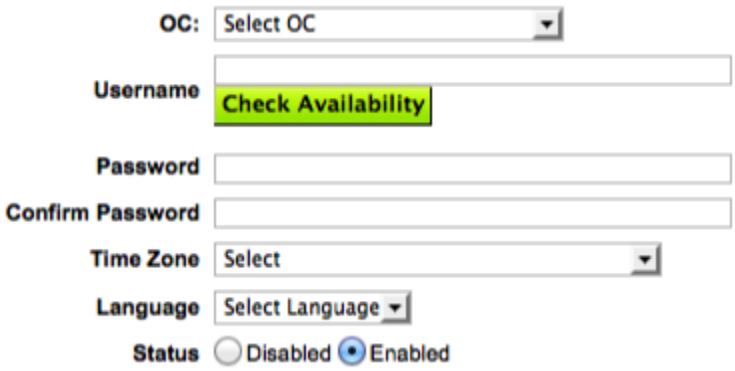
- New OC User
- New Operating Company
- OC Dashboard
- OC User Manager

To access agency tools, choose the **Clients > Clients Manager > OC** menu item in the **Textboom** toolbar.

New OC User

The **OC User** feature is a tool for creating an Operation Company (OC) user. We provide you with many options, and yet it's quite easy to setup.

You may access the **OC User** feature by choosing **Clients > Clients Manager > OC > User Manager > New User** from the toolbar. After choosing this menu item, you will see a page containing fields like the ones we display in the figures below.

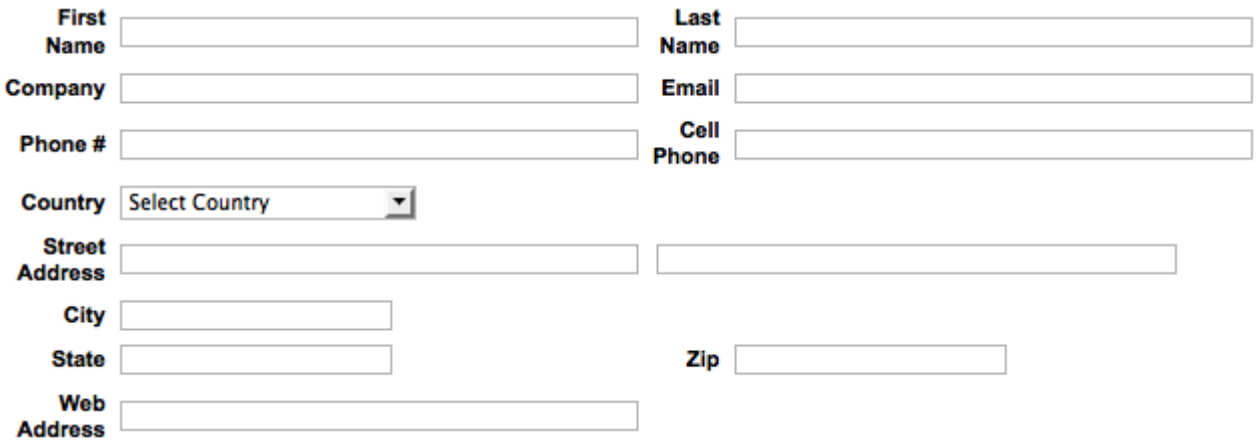


Configuring the User Account

To create a user account, you simply complete all the fields and then save the user profile. To begin, follow these steps:

1. From the drop-down list, click the **OC** (Operating Company) to which you want to add the user.
2. Enter the **Username**, then click the **Check Availability** button.
3. Enter the **Password**, then enter the same value for **Confirm Password**.
4. Choose the **Time Zone** and **Language** and, if necessary, choose ***Disabled*** for the **Status**.

The right side of the page contains the remain user properties (see figure below). Continue following the steps below to complete setup of the user account.



5. Enter the **First Name, Last Name, Company**, **Email** address, **Phone #** and **Cell Phone** for this the user.
6. Choose the **Country**, then enter all the address information.
7. Finally, enter the **Web Address** for this user.
8. Click the **Save** button to commit your changes and complete the wizard.

New Operating Company

The **New OC** feature is a tool for creating an operating company. Here, you define the username, password, business information, rights and permissions, billing package, and so on. After saving an operating company profile, you may then return to edit most of its settings.

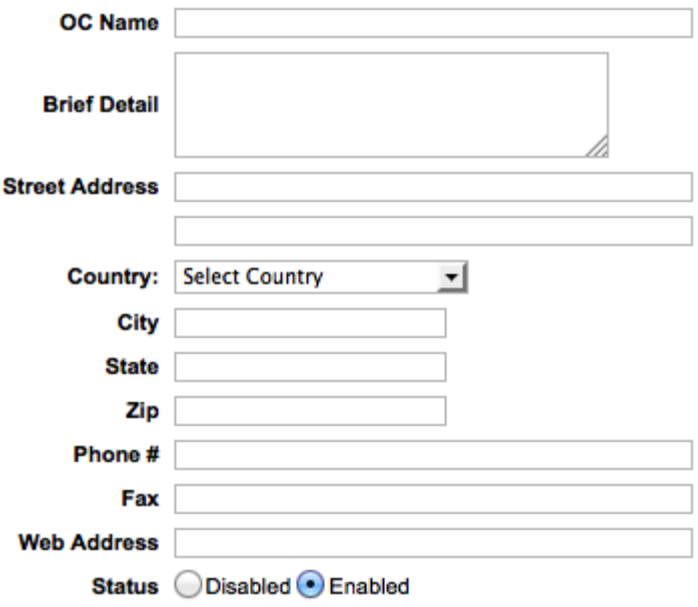
You may access the **New OC** feature by choosing **Clients > Clients Manager > OC > New OC** from the toolbar. After choosing this menu item, you will see a page containing the fields that we display in the figures below.

Configuring the Operating Company

Notice that there are several panels on the page:

- OC Detail
- Contact Details
- Billing
- Shortcode
- User Messaging
- OC Setup
- Rights & Permissions

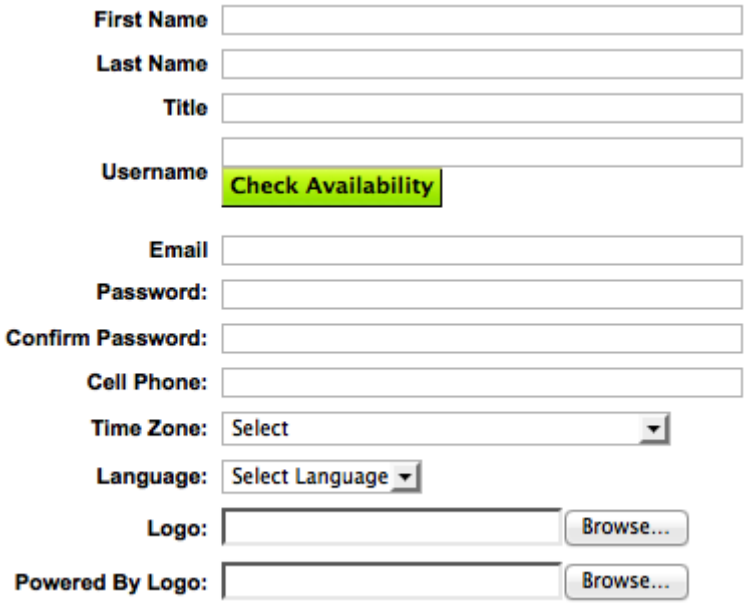
Page down to see all of the details. Then come back to the top of the page. The first panel is **OC Detail**, and it contains these fields:



Most items are self-explanatory, but we guide you through the entire setup here in this topic. To begin, follow these steps:

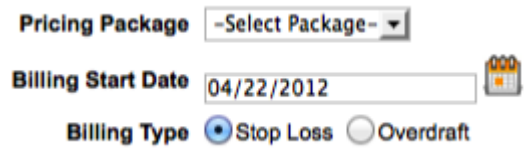
1. In **OC Name**, enter the name of the operating company.
2. Describe the company in **Brief Detail**, and then enter the **Street Address**.
3. Choose a **Country** from the drop-down list, and then enter the **City**, **State** and **Zip** code.
4. Enter a **Phone #**, **Fax** number, **Web Address** and, if necessary, set the **Status** to ***Disabled***.

Next, you may enter the **Contact Details** for the primary contact of the operating company. These are found in the panel on the upper right side of the page:



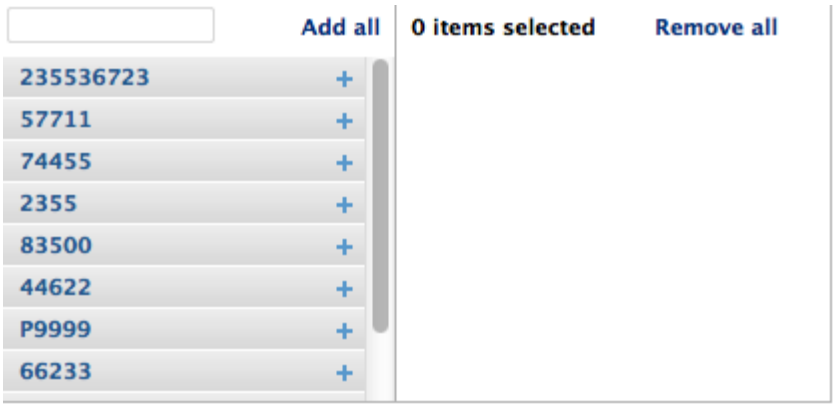
5. Enter the **First Name** and **Last Name**, and **Title**.
6. Enter the **Username**, and then click the **Check Availability** button.
7. Enter an **Email** address.
8. Enter the **Password**, then enter the same value for **Confirm Password**.
9. Enter the **Cell Phone** number, and then choose the **Time Zone** and **Language**.
10. Click the **Browse** button to choose a **Logo** image from your computer. Do the same for **Powered By Logo**.

Next consider if you want to configure the options in the **Billing** panel:



11. Choose the **Pricing Package** that you want to apply to this operating company.
12. Choose the **Billing Start Date**.
13. Decide if you would rather set the **Billing Type** to ***Overdraft***.

Optionally, you may choose **Shortcodes**. Notice the listing of codes on the left side of this panel. Follow the steps below to setup the shortcodes:

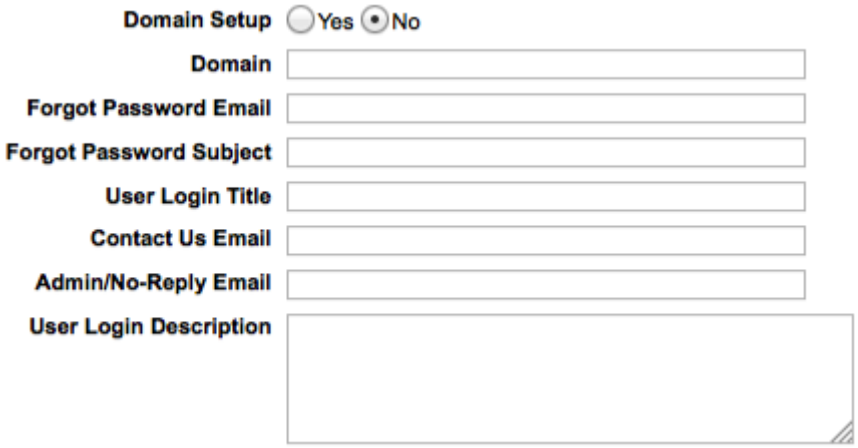


14. For each of the codes you want to apply, click the plus (+) sign. The code will appear on the right side.
15. If you change your mind, click the minus (-) sign to remove any codes that you previously added.

You might want to specify the default **User Messaging**. This section begins with the **Opt-Out Message** field on the left side:

16. In the **User Messaging** section, enter the **Opt-Out Message, Help Message**, and **Subscription Reminder Message** for this operating company.

The next section is **OC Setup**, where you may enter web, email and meta data information that pertains to this operating company. Here is an image of the left side of this section:



Throughout the entire section, enter the information that you want to apply to this operating company.

In the last section, **Rights & Permissions**, you'll find that this operating company has permissions to access all of the various features of **Textboom**. Examine the entire list and decide if you want to withhold any of these permissions. This might be useful if you are setting up multiple operating companies.

When you are done configuring the operating company, click the **Save** button to commit your changes and complete the wizard.

OC Dashboard

The **OC Dashboard**, also known as **OC Manager**, displays a listing of all operating companies for your account. You may access this feature by choosing **Clients > Clients Manager > OC** from the toolbar. After choosing this menu item, you'll see a page having the characteristics which we describe below.

Filters

On the left side of the report control panel, you'll find the **Status** filter. Choose one of the items and watch for the results to change accordingly.

Along with this filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.

Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will find all of the email campaigns.

Managing OCs

At the extreme right end of each record in the listing you'll find a series of small icons:

- Click this icon to view the OC details (you will exit the OC Manager).
- Click this icon to edit the OC (you will exit the OC Manager).
- Click this icon to enable the OC.
- Click this icon to disable the OC. A disabled OC cannot be used again until it is enabled.
- Click this icon to delete a OC. A deleted OC is both disabled and invisible.

OC User Manager

The **OC User Manager** displays a listing of all users for the operating company that you choose. You can filter by **OC** or **Status**. You can edit, disable, re-enable, and delete users. You may also perform a search for a specific word or number. The listing will change to match any filters that you apply, and you can combine several filters to make your report very specific. To clear away any filter, you can perform a reset at any time.

You may access this feature by choosing **Clients > Clients Manager > OC > User Manager** from the toolbar. After choosing this menu item, you'll see a page having the characteristics which we describe below.

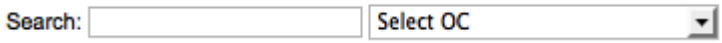
Managing Users

At the extreme right end of each record in the listing you'll find a series of small icons:

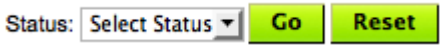
- Click this icon to edit the user (you will exit the User Manager).
- Click this icon to enable the user.
- Click this icon to disable the user. A disabled user cannot be used again until it is enabled.
- Click this icon to delete the user. A deleted user is both disabled and invisible.

Filters

On the left side of the report control panel, you'll find a group of filters (below). Choose from one or more of these drop-down menus to filter by **OC** or **Status**.



Along with these filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.



Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Add, Enable, Disable, or Delete Users

In the upper right corner of the page, locate these icons:

Check the box next to any record, and then click the icon that corresponds to the function you want to apply:

- **New** - add a new OC User.
- **Enable** - enables a record that has been previously been disabled.
- **Disable** - Click this icon to disable the user. A disabled user cannot be used again until it is enabled.
- **Delete** - click this icon to delete the user. A deleted user is both disabled and invisible.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will find all of the operating company users.

Data

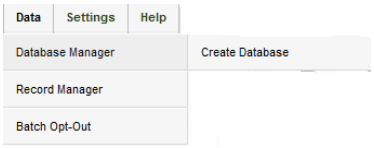
This chapter covers database management and records management. In the topics below, we explain how to create and manage databases.

- Creating a Database
- Database Manager
- Avoiding Network Look Up in Batch Upload Report
- Record Manager
- New Record
- Record Fields Manager
- New Record Field

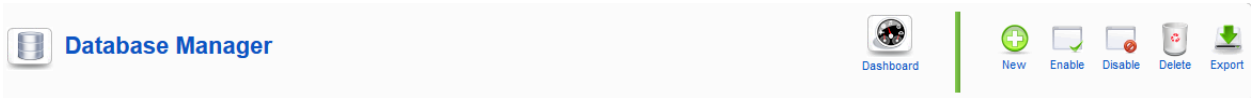
To access agency tools, choose the **Data** menu in the **Textboom** toolbar.

Creating a Database

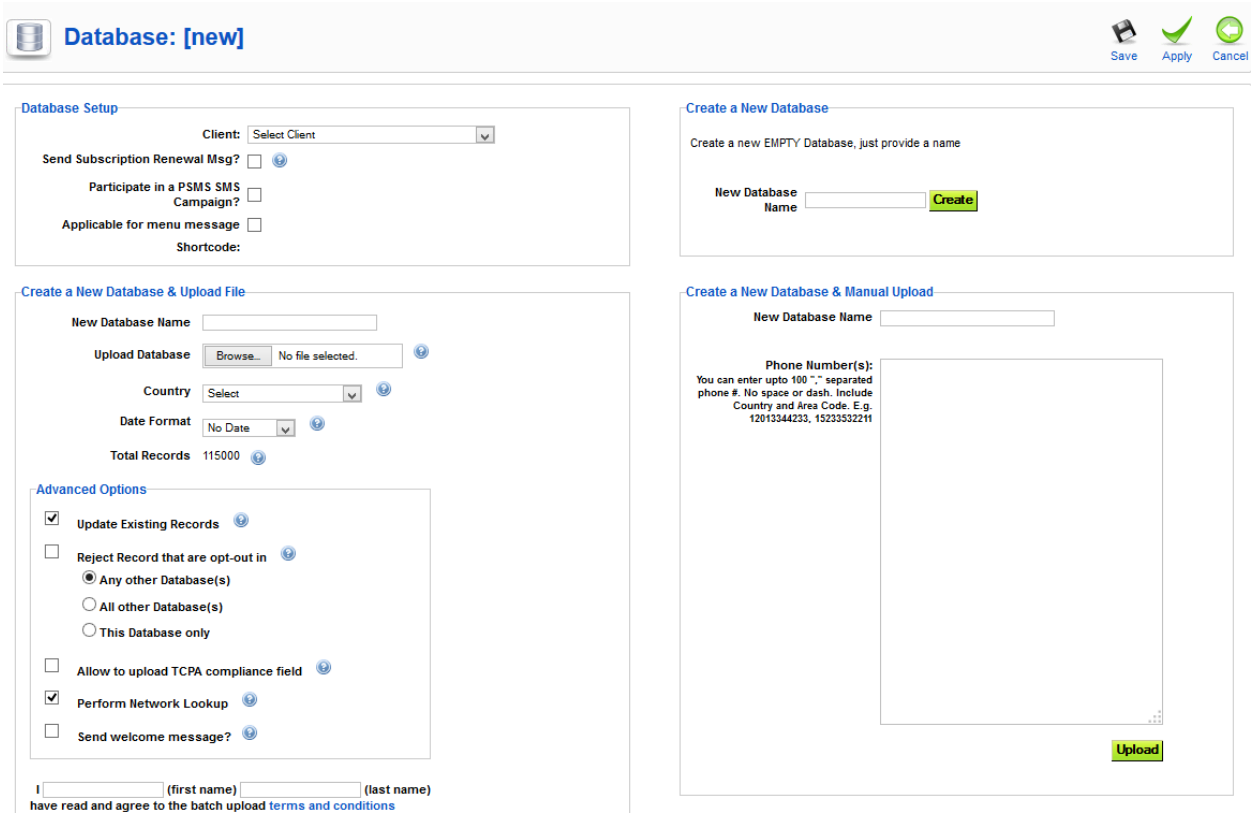
With the **Create Database** feature, you can create a new messaging database. You may access this feature by choosing **Data > Database Manager > Create Database** from the toolbar



Or by clicking on **New** in the Database Manager.



After choosing this menu item, you will see a page containing the features that we describe below.

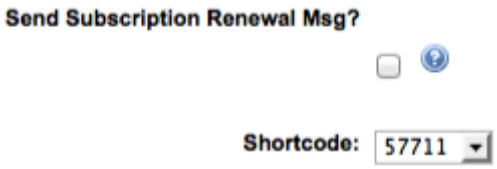


Configuring a new Database

Notice that there are several panels on the page:

- Database Setup
- Create a New Database
- Create a New Database & Upload File
- Create a New Database and Manual Upload
- Database Messaging
- Database Notification
- Follow up & Messaging

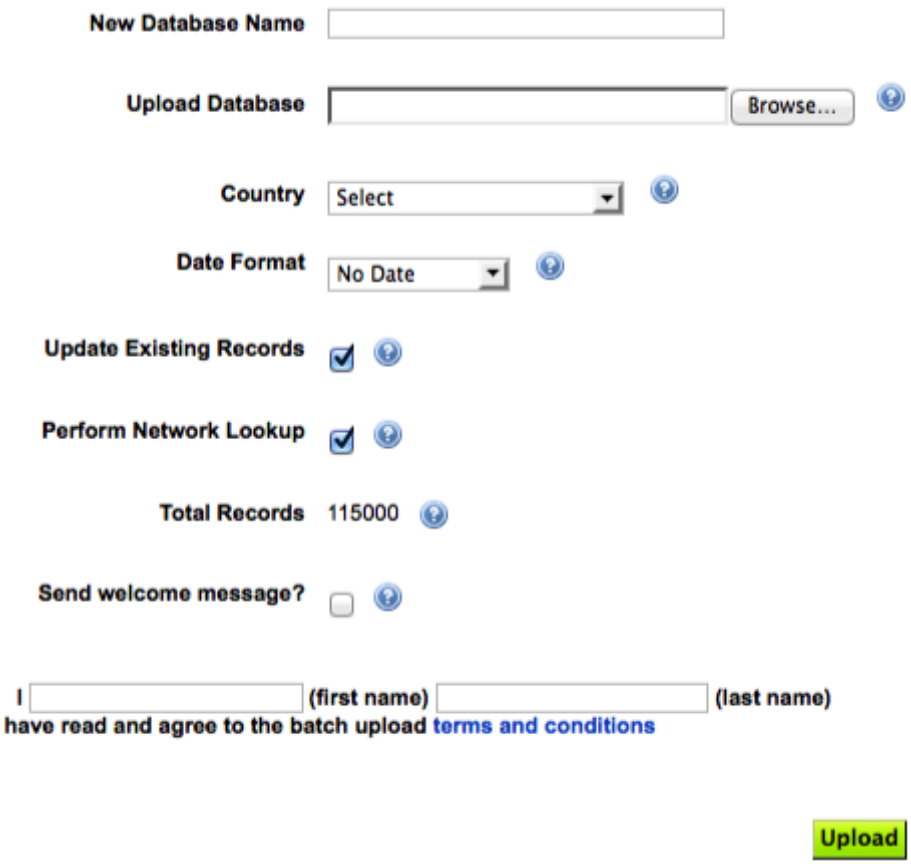
The first panel is **Database Setup**:



Follow these steps to begin:

1. Check the **Send Subscription Renewal Msg?** box if you need to send a monthly subscription reminder to this list. The text for the reminder message can be entered in the Subscription Reminder field for this list. If you check this box and leave the subscription reminder text empty, the system will send the default text set for the short code associated with this list. You can find the Subscription Reminder Message field in the List Messaging section below on the same page.
2. Choose a **Shortcode** from the drop-down list.

You have three options for creating a database: create a new list without adding records, uploading a file, or manually enter a list of phone numbers. If you require the first option, then have a look at the **Create a New Database & Upload File** panel:



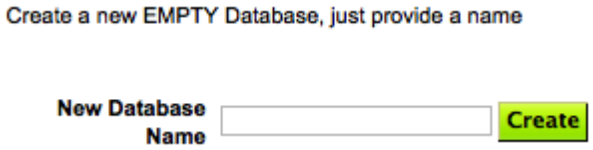
To upload a database, do the following:

1. Enter the **New Database Name**.
2. Click the **Browse** for **Upload Database**, choose the file and click **OK**.
3. Choose a **Country**.
4. Choose a **Date Format**. If there is no date field in the database that you are uploading, then leave the default of ***No Date***.
5. Uncheck the **Update Existing Records** box if you don't want to match any existing records.
6. Uncheck the **Perform Network Lookup** box system if you have a ***[Carrier]*** field in the upload file. The system will perform a network lookup for phone numbers that are missing the carrier code or if the carrier code is wrong. **NOTE:** If you upload a file and the system identifies a record that is already in the database, it will update the record in the database with the information from the file. It will replace existing data with file data, or add data to fields that were empty before.
7. Note that the maximum number of records that you may upload in any single database file is 115,000.
8. Check the **Send welcome message** box if you want to send a message to each record in the database that you are uploading. Then, enter the **Welcome Messag**e. Optionally,

check the box to **Send a welcome message to existing Record** if you also want to send a welcome message to all existing records.

9. Finally, enter your **first name** and **last name** to signify that you agree to the terms and conditions. (Click the link to review the terms.)

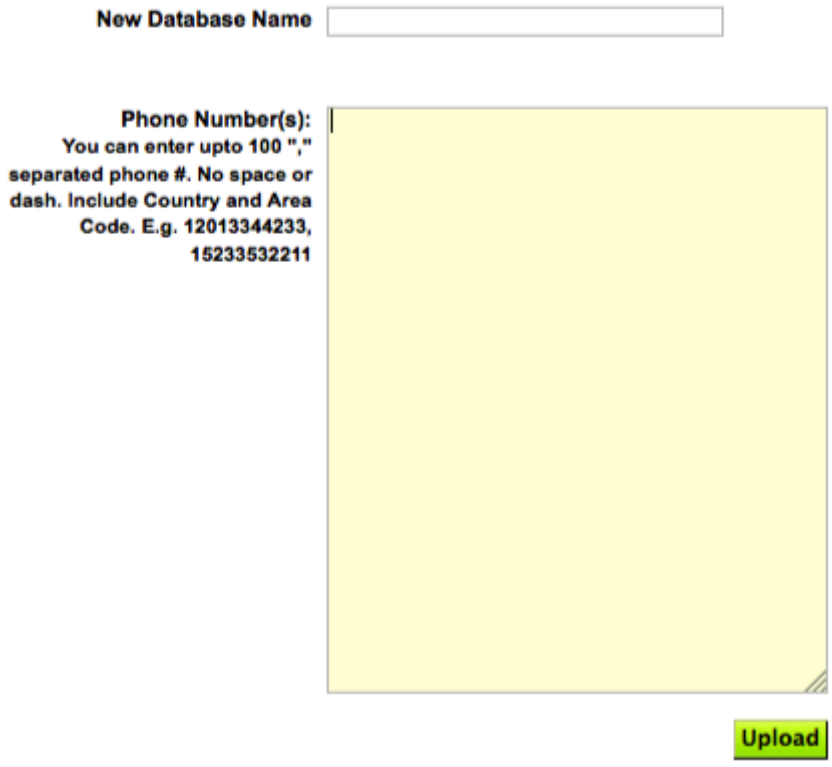
If you simply want to create an empty database, find the **Create a New Database** panel in the upper right:



It easy to create an empty database:

1. Enter the **New Database Name**.
2. After a moment, the Database Manager page will appear.
3. Your new database is likely to be found near the bottom of the listing.

Perhaps you want to edit a simple database containing a set of phone numbers. You can accomplish this in the panel on the right side of the page, **Create a New Database & Manual Upload**:


New Database Name
Phone Number(s):
You can enter upto 100 "," separated phone #. No space or dash. Include Country and Area Code. E.g. 12013344233, 15233532211
Upload

To create this type of database, do the following:

1. Enter the **New Database Name**.
2. Enter the Phone Numbers. The maximum number is 100, and you must separate each number by a comma.
3. When you're done, click the **Upload** button
4. After a moment, the Database Manager page will appear.
5. Your new database is likely to be found near the bottom of the listing.

Complete these optional steps:

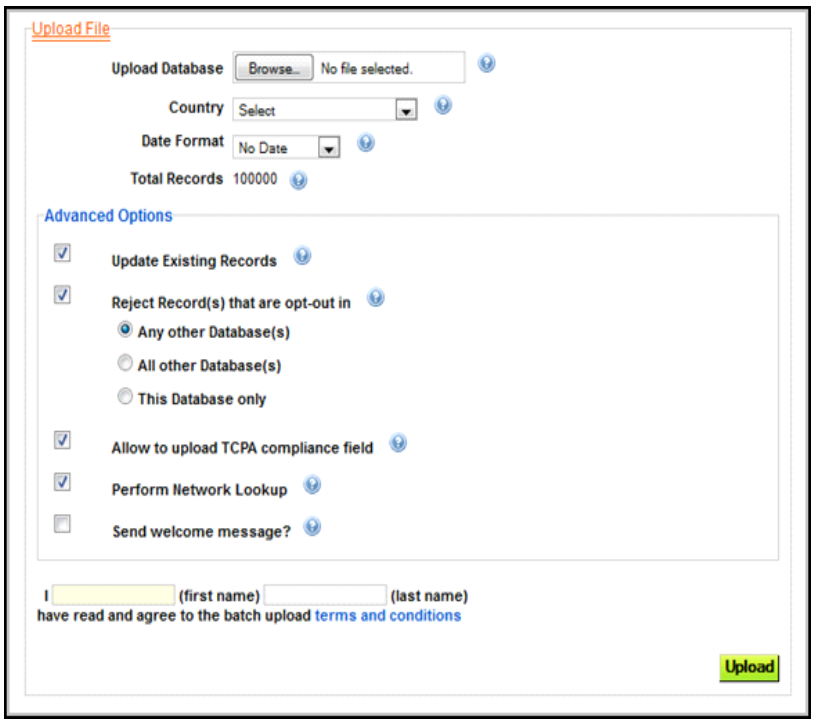
1. In the **Database Messaging** section, enter the **Opt-Out Message, Help Message**, and **Subscription Reminder Message** for this database.
2. In the **Database Notification** section, check one or more of the boxes to send a notification when a new, existing or opt-out record change takes place in the database. A new record is a complete new entry in the database, and an existing record already resides in the database. The opt-out value for a record may change as a result of user response or administrative action.
3. Finally, enter a **Follow-up Message** and choose a **Follow-up** interval.

Click the **Save** button at the top of the page to commit your changes and exit to the Database Manager .

Batch Upload – Advanced Options

We have added two additional functions in the Batch Upload: the ability to reject any record within a .csv file that has an "opt-out" status within the specific database and the ability where your .csv file can include a column representing "tcpacompliant" status. In this option, the system will recognize this field and update the record accordingly.

Where to find it:



Advanced Options:

- **Update Existing Records**: If checked, system will update Record with uploaded information.

- **Reject Record that are opt-out in Database**: If you check this option, the system will not accept a Record in the CSV file that is in Opt-Out status in
    - **Any other database(s)**: If you choose this radio button the record will NOT be uploaded if the record is Opt-out in at least one other database
    - **All other database(s)**: If you choose this radio button the record will NOT be uploaded if the record is Opt-out in ALL the other databases
    - **This database only**: If you choose this radio button the record will NOT be uploaded if the record is Opt-out in the database you upload to (Not Applicable for new database)

- **Allow to upload TCPA compliance field**: If checked, system will accept the "tcpacompliant" field in the CSV file and will update its value for the record.

  If unchecked, the system will ignore this field in the CSV file if exist.

  Note: If you don't have the proper permission, you will not be able to change the value of this checkbox.

- **Perform Network Lookups**: If checked, system will look for the carrier servicing EACH phone number in the file.

  If unchecked, system will expect that you provide the "carrier" field in the upload file. System will perform a network lookup for phone numbers that are missing the carrier code or if the carrier code is wrong.

- **Send Welcome Message**: If Checked, system will send a text message to Record uploaded to the Database

Avoiding Network Look Up in a Batch Upload Report

To avoid encountering a network lookup during a batch upload, we recommend that you take these two precautions:

1. If there is no check in the **Perform Network Lookup** box, then the system requires that the user include a carrier_id field in the CSV file. That means that the user already has the carrier_id value and it is already in the CSV file.

    Note: If the system finds that there is already a carrier_id value in the database for this cell phone number and that it is different than the one that is uploaded in the CSV file, the system will perform a network lookup.

2. To update existing list members, without performing a network lookup and without providing the carrier_id field in the CSV file, simply check the boxes for **Update Existing Records** and **Perform Network Lookup**.

Note: The system will perform a network lookup if it finds that the carrier_id value has not been updated in the last 90 days.

See the topic, Creating a Database.

List Batch Upload

When uploading a file, the system is examines it and classifies each record in the file according to one of the following cases:

Case 1 - The record in the file has an Email address and the Cellphone number is empty.

If a member record having the same email address already exists in the database, the system will choose the Cellphone number from the existing member and will add the member to the list. Otherwise, the system will generate a new pseudo Cellphone number, create a new member with the email and pseudo Cellphone number, and also add this member to the list.

> **Note:** The system will update existing member record data fields if they are provided in the batch file.

Case 2 - The record in the file has a Cellphone number and the Email address is empty.

If a member record with this Cellphone number exists then the system will add the member to the list. Otherwise, the system will create a new member record and add it to the list

Case 3 - The record in the file has both an Email address and a Cellphone number. There are few possibilities:

1. If a member record having the same email address already exists in the database and it has a pseudo carrier, then the system will update the member record with the Cellphone number and also update the Carrier field.

2. If a member record having the same email address already exists in the database yet has a different Cellphone number (real number and real carrier), then the system will reject the record in the batch file and will write a comment in the batch output file.

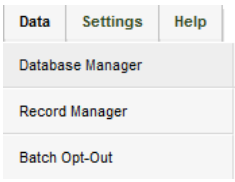
3. If the email address does not exist in the system (not found for existing members) then the system will compare the Cellphone number. In case the member record with this Cellphone number exists in the database, then the system will add the member to the list and update the Email address field. Otherwise, the system will create a new member record with the Cellphone number and email address and add it to the list.

4. If the email address and Cellphone number match an existing member record, then the system will update the other fields and add the member to the list.

Database Manager

The **Database Manager** helps you manage all the databases in your account. From the manager, you can execute all database management actions with ease. Once you create a campaign, it will be appear with all other databases.

To begin, you can access this feature by selecting **Data > Database Manager** from the toolbar



Don’t forget that you can access the SMS Campaigns and tools by utilizing the quick link icons that are located under the toolbar on the Dashboard.

The following sections explain all the functions of the database manager that you can use to create your campaigns.

Filters

On the left side of the control panel, you'll find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results. You'll also find a **Status** drop-down list, from which you can select a status filter.

Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Restrict by Date Range

On the right side of the report control panel, you'll find the **From** and **To** of date filters:

Follow these steps to limit the records in the listing to only those that fall within a date range:

1. Click the **From** calendar icon (for example, enter 4/1/2012).
2. Next, click the **To** calendar icon (you might enter 4/30/2012).
3. Click the **Go** button to update the listing. Only the records that fall within the date range will appear in the results.
4. Click the **Reset** button to revert back to the original filter settings.

Enable, Disable, or Delete Databases

In the upper right corner of the page, locate these icons:

Check the box next to any record, and then click the icon that corresponds to the function you want to apply:

- **New** - add a new database.
- **Enable** - enables a database that has been previously been disabled.
- **Disable** - Click this icon to disable the database. A disabled database cannot be used again until it is enabled.
- **Delete** - click this icon to delete the database. A deleted database is both disabled and invisible.
- **Export** - Click this button to export the database, and then choose a location to save the file.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see a list of all your databases.

Managing Databases

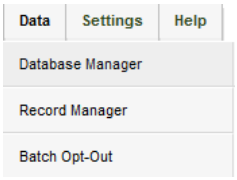
At the extreme right end of each record in the listing you'll find a series of small icons:

- Click this icon to view the database (you will exit the Database Manager).
- Click this icon to edit the database (you will exit the Database Manager).
- Click this icon to export the database, and then choose a location to save the file..
- Click this icon to disable the database. A disabled campaign cannot be used again until it is enabled.
- Click this icon to delete the database. A database is both disabled and invisible.

Record Manager

The **Record Manager** helps you manage all the phone records in your account. From this manager, you can execute all record management actions with ease.

To begin, you may access this feature by selecting **Data > Record Manager** from the toolbar



Don’t forget that you can access the SMS Campaigns and tools by utilizing the quick link icons that are located under the toolbar on the Dashboard.

The following sections explain all the functions of the database manager that you can use to create your campaigns.

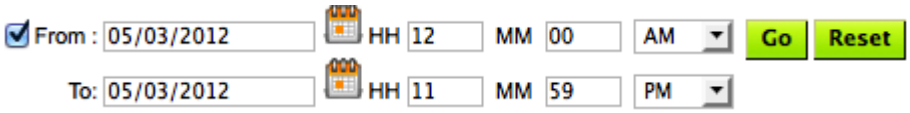
Filters

On the left side of the control panel, you'll find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results. You'll also find a **Status** drop-down list, from which you can select a status filter. You may also filter by **Carrier**.

Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Restrict by Date Range

On the right side of the report control panel, you'll find the **From** and **To** of date filters:

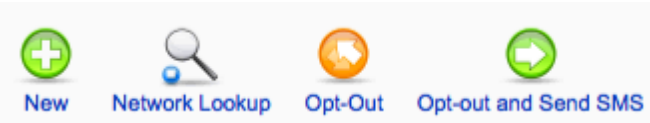


Here you can choose a beginning (**From**) and ending (**To**) of date range that will restrict the records that appear in the results.

1. Click the **From** calendar icon (for example, choose April 1).
2. Then, optionally, choose the hour (**HH**) and minutes (**MM**) that will define the precise time for the start of the report date range. Also choose ***AM*** or ***PM*** from the drop-down. You could enter 9:00 AM.
3. Next, click the **To** calendar icon (you might choose April 30).
4. Then, optionally, choose the hour (**HH**) and minutes (**MM**) that will define the precise time for the start of the report date range You could enter 5:00 PM.
5. Click the **Go** button to update the listing. Only the records that fall within the date range will appear in the results.
6. Click the **Reset** button to revert back to the original filter settings.

Enable, Disable, or Delete Records

In the upper right corner of the page, locate these icons:



Check the box next to any record, and then click the icon that corresponds to the function you want to apply:

- **New** - add a new database.
- **Network Lookup** - performs a mobile network lookup to confirm the validity of the phone number.
- **Opt-out** - Click this icon to set the Opt-out value for this record. No message will be sent.
- **Opt-out and Send SMS** - Click this icon to set the Opt-out value for this record. An alert message will be sent.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see a list of all your records.

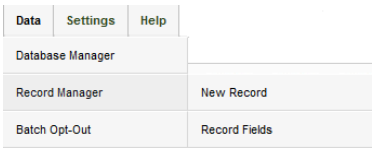
Managing Records

At the extreme right end of each record in the listing you'll find a series of small icons:

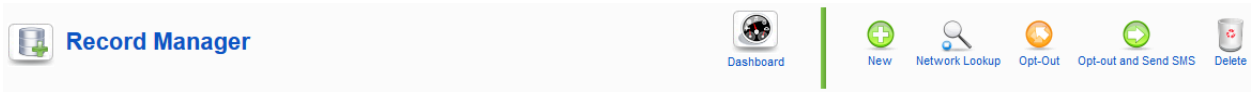
Click this icon to send an SMS message.
Click this icon to edit the record (you will exit the Record Manager).
Click this icon to perform a mobile network lookup to confirm the validity of the phone number.
Click this icon to set the Opt-out value for this record. No message will be sent.
Click this icon to set the Opt-out value for this record. An alert message will be sent.
Click this icon to delete the database. A database is both disabled and invisible.

New Record

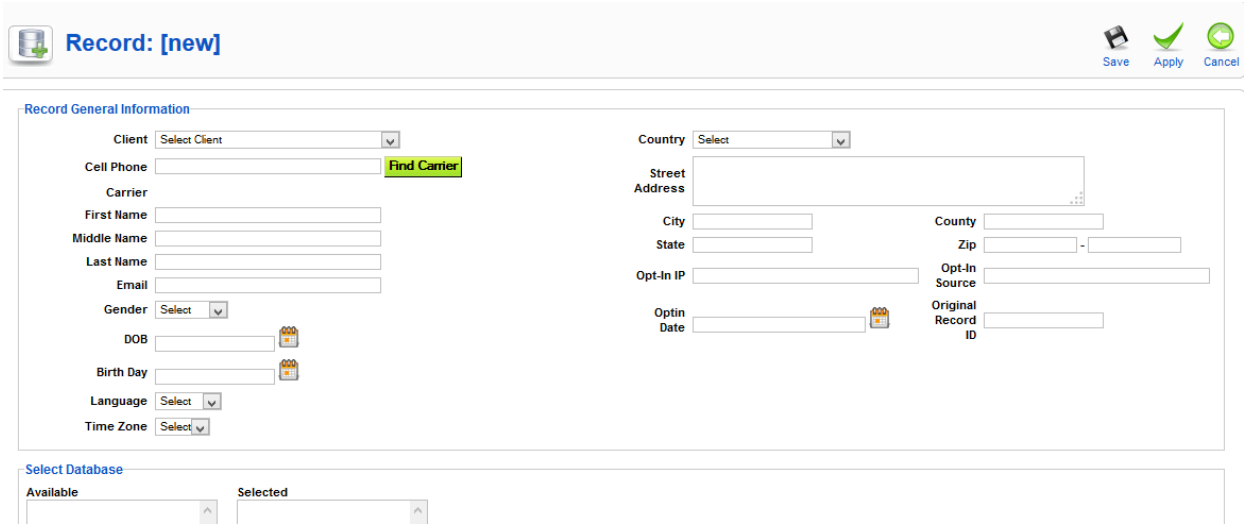
The **New Record** feature is a tool for creating a new record. You may access this feature by choosing **Data > Record Manager > New Record** from the toolbar.



Or by click in on New in the Record Manager



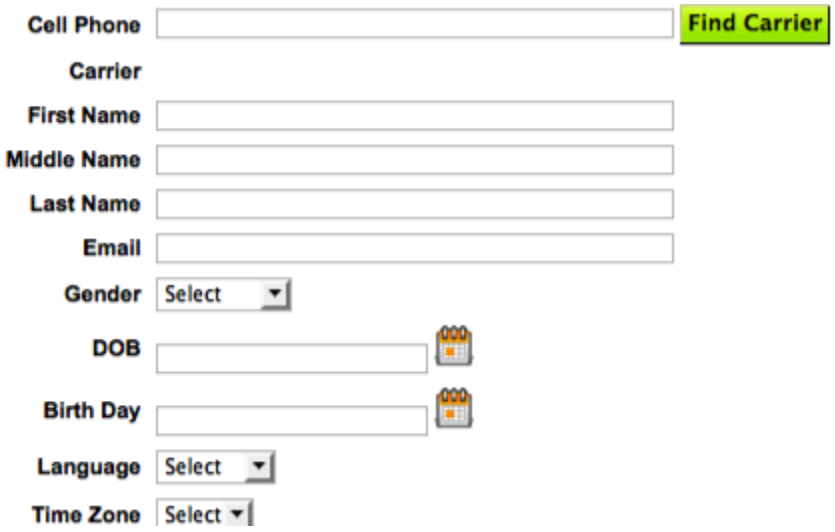
After choosing this menu item, you will see a page containing the fields that we display in the figures below.



Notice that there are several panels on the page:

- Record General Information
- Record Custom Information
- Select Database

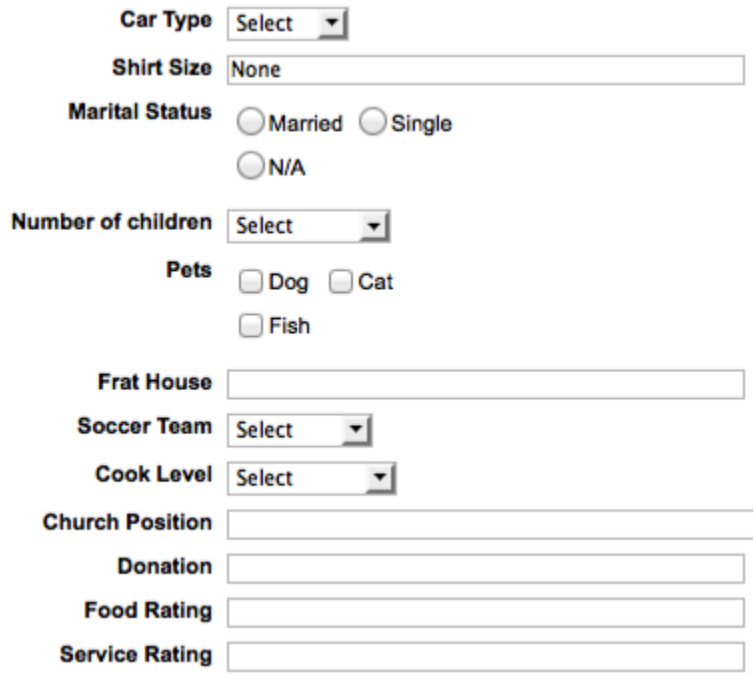
The first panel is **Record General Information**, and the left side contains these fields:



Most items are self-explanatory, but we guide you through the entire setup here in this topic. To begin, follow these steps:

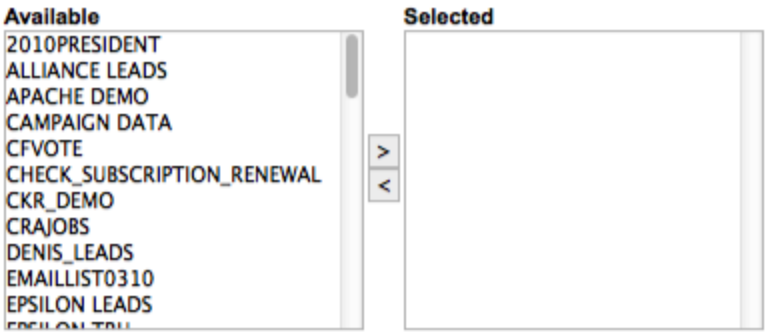
1. First specify the **Cell Phone Carrier**. You may also click the Find Carrier button and select a carrier from the listing.
2. Enter the **First Name**, **Middle Name**, **Last Name**, and **Email** address.
3. Choose a **Gender**, **DOB**, or optionally a **Birthday**. Also, choose the **Time Zone** and optionally a **Language**.
4. Choose a **Country**, then enter the **Address**, **City**, **State** and **Zip** code.
5. Specify an **Opt-In IP** address, and an **Opt-In Source**.
6. Choose and **Opt-In Date** and specify the **Original Record ID**.

Next, you may enter the **Record Custom Information**:



These fields are optional. Simply enter values that you want to apply to this record.

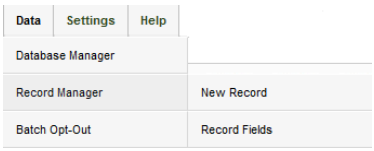
The last panel is **Select Database** panel.



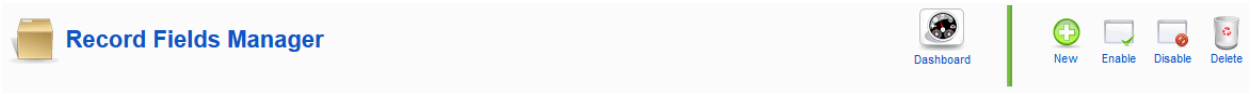
Using the arrow key, choose the databases in which you want this record to go. You can also double-click on the database to move it to **Selected**.

Record Fields Manager

The **Record Fields Manager** helps you manage fields within records. To begin, you may access this feature by selecting **Data > Record Manager > Record Fields** from the toolbar



After choosing this menu item, you will see a page containing the fields that we display in the figures below.



The following sections explain all the functions of this manager.

Filters

On the left side of the control panel, you'll find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results. You'll also find a **Status** drop-down list, from which you can select a status filter.

Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Add, Enable, Disable, or Delete Fields

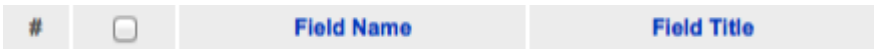
In the upper right corner of the page, locate these icons:

Check the box next to any record, and then click the icon that corresponds to the function you want to apply:

- **New** - add a new record field.
- **Enable** - enables a field that has been previously been disabled.
- **Disable** - Click this icon to disable the field. A disabled field cannot be used again until it is enabled.
- **Delete** - click this icon to delete a field . A deleted field is both disabled and invisible.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see a list of all your records.



Managing Record Fields

At the extreme right end of each record in the listing you'll find a series of small icons:

Click this icon to edit the field (you will exit the Record Fields Manager).
Click this icon to disable the field. A disabled field cannot be used again until it is enabled.
Click this icon to delete a field. A deleted field is both disabled and invisible.

New Record Field

The **New Record Field** feature is a tool for creating a new field in a record. You may access this feature by choosing **Data > Record Manager > Record Fields > New Field** from the toolbar.

After choosing this menu item, you will see a page containing the fields that we display in the figures below.

Editing the Field

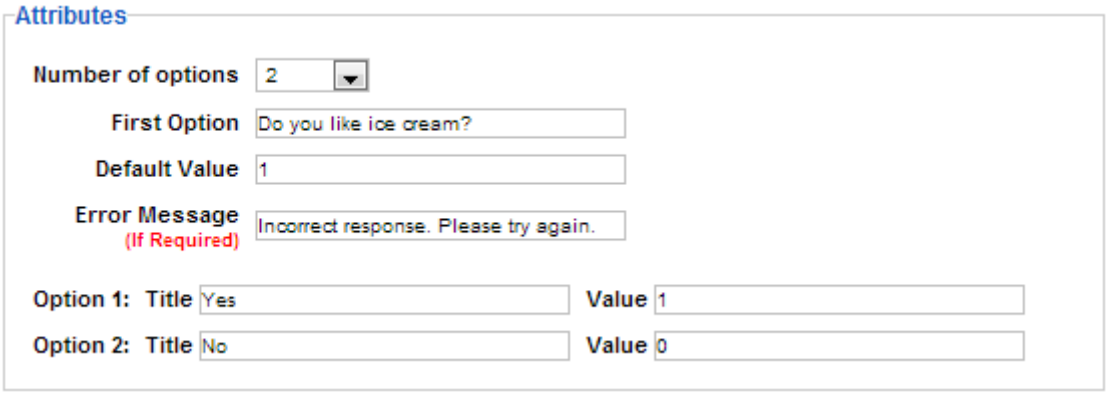
Notice that there are several panels on the page:

- Field Details
- Attributes
- Predefined Fields

The first panel is **Field Details**, and it contains these fields:

To begin, follow these steps:

1. First, choose the **Client** name.
2. Next, specify the **Field Name**. This is the *database name* of the field.
3. Enter the **Field Title**, which is the display label for this field.
3. If this field is to be mandatory, then check the **Required** box.
4. Choose a **Type**. The choice here determines not only the display of this field on a form, but also the supporting data structure. When you change the value of **Type**, say, to a ***Drop Down***, you'll see the elements in the **Attributes** panel change accordingly (see below). Edit these elements to match your requirements.
5. If necessary, you may initially set the **Status** to disabled.



White Label

Textboom offers white-label features that offer maximum flexibility in brand your operating companies, agencies and clients.

White Label Manager

The **White Label Manager** displays a listing of all white labels for your account. You may access this feature by choosing **Settings > White Label** from the toolbar. After choosing this menu item, you will see a page containing the features that we describe below.

Filters

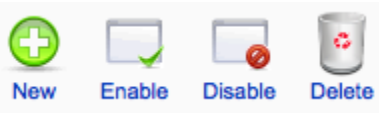
On the left side of the control panel, you may choose from one or more drop-down menus to filter by **Type** or **Status:**

Along with these filters, you'll also find a **Search** field. Here you can enter a specific value, such as "GOSSIP" or "57111". Click the **Go** button (found at the extreme right of the page) to initiate the search. Any records containing the value in the **Search** field will appear in the results.

Click the **Go** button to update the listing; click the **Reset** button to revert back to the original filter settings.

Add, Enable, Disable, or Delete White Labels

In the upper right corner of the page, locate these icons:



Check the box next to any record, and then click the icon that corresponds to the function you want to apply:

- **New** - add a new white label .
- **Enable** - enables a white label that has been previously been disabled.
- **Disable** - Click this icon to disable the white label. A disabled white label cannot be used again until it is enabled.
- **Delete** - click this icon to delete a white label. A deleted white label is both disabled and invisible.

Column Headings

The figure below displays the first few column headings. Underneath these headings, you will see a list of all your short URLs.

Managing White Labels

At the extreme right end of each record in the listing you'll find a series of small icons:

- Click this icon to edit the Short URL (you will exit the Short URL Manager).
- Click this icon to disable the Short URL. A disabled Short URL cannot be used again until it is enabled.
- Click this icon to delete a Short URL. A deleted Short URL is both disabled and invisible.

White Label Settings

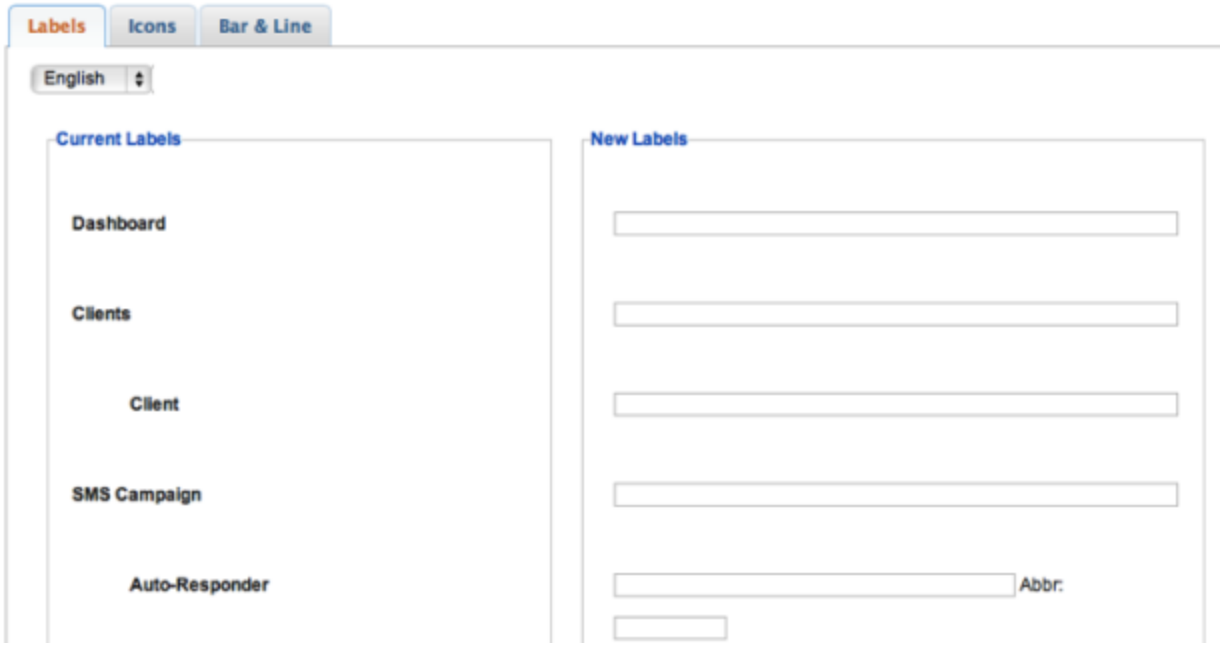
You can configure **White Label Settings** for operating companies, agencies, and clients for your entire account. You access this feature by choosing **Settings > White Label > White Label Settings** from the toolbar. After choosing this menu item, you will see a page containing the features that we describe below.

The general procedure for configuring white label settings is to first select an entity type: operating company, agency, client, or personal. Changes to a ***Personal*** type will affect individual users of the system. You then choose the specific entity. Finally, you configure the **Labels**, **Icons**, and graphics (**Bar & Line**). The settings that you make here will cause various changes throughout the **Textboom** environment, depending on the entity that you choose.

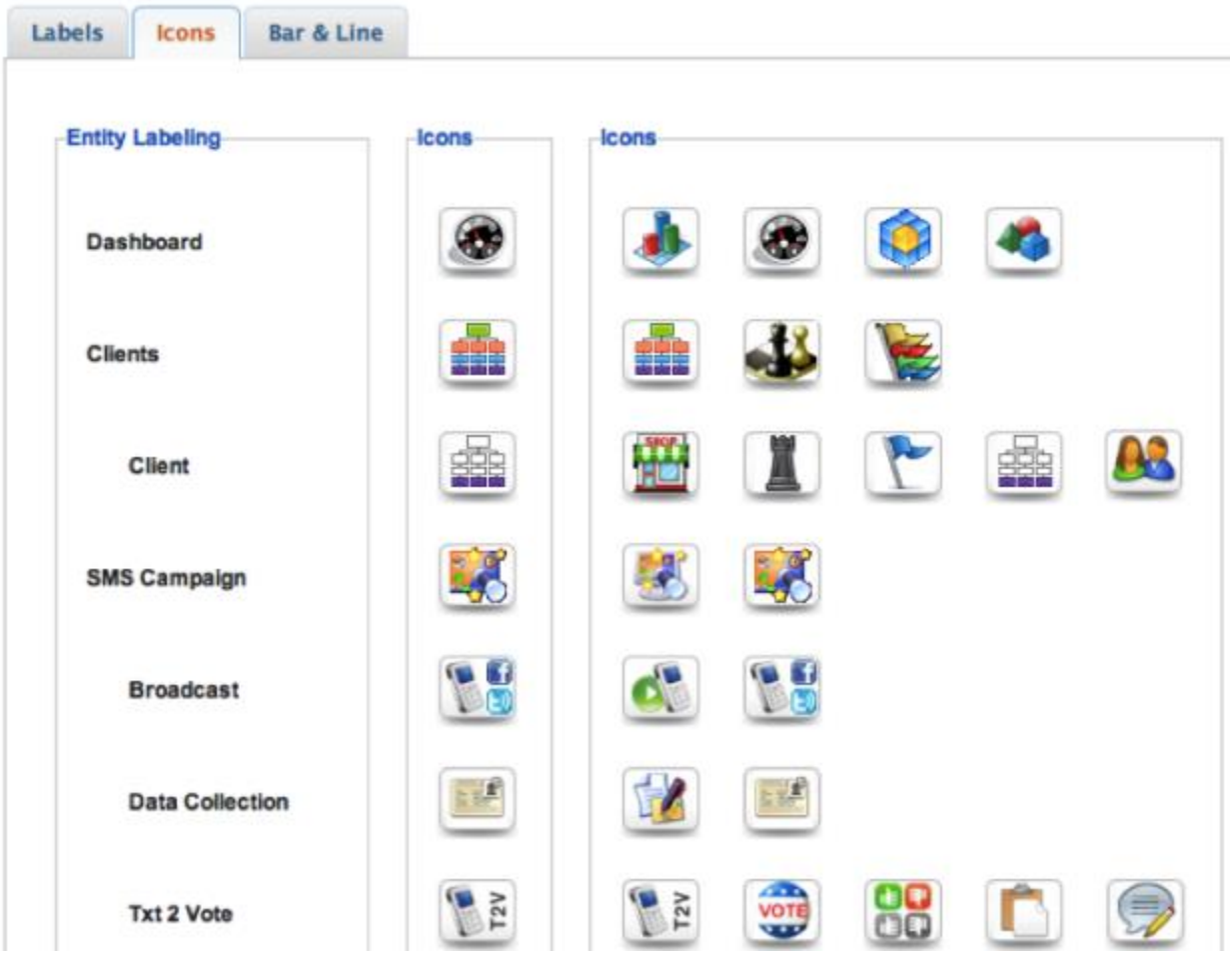
NOTE: Once you save the white label settings for this entity, you will not be able to change the entity. You will be able to edit the white label settings for this entity or delete the settings altogether and start a new one. If you don't see the name of a company in the list it is probably because a white label setting already exits for it. In this case, you should find it in the listings of the White Label Manager.

Follow these steps to configure white label settings:

1. Click the **Client** drop-down, and then select the type. In the adjacent drop-down, choose the specific entity for which you want to add or change white label settings.
2. On the **Labels** tab, enter the replacement text for the **Dashboard**, **Clients**, **SMS Campaign**, and so on.



3. Click the **Icons** tab, and decide if you want to substitute any icons for those already chosen.



4. Click the **Bar & Line** tab, and choose the Bar and Line colors that you prefer.

5. Click the **Save** icon at the top of the page to commit your changes.